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THESIS

An Analysis of Supervisor Training Programs

by

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the requirements for the degree of

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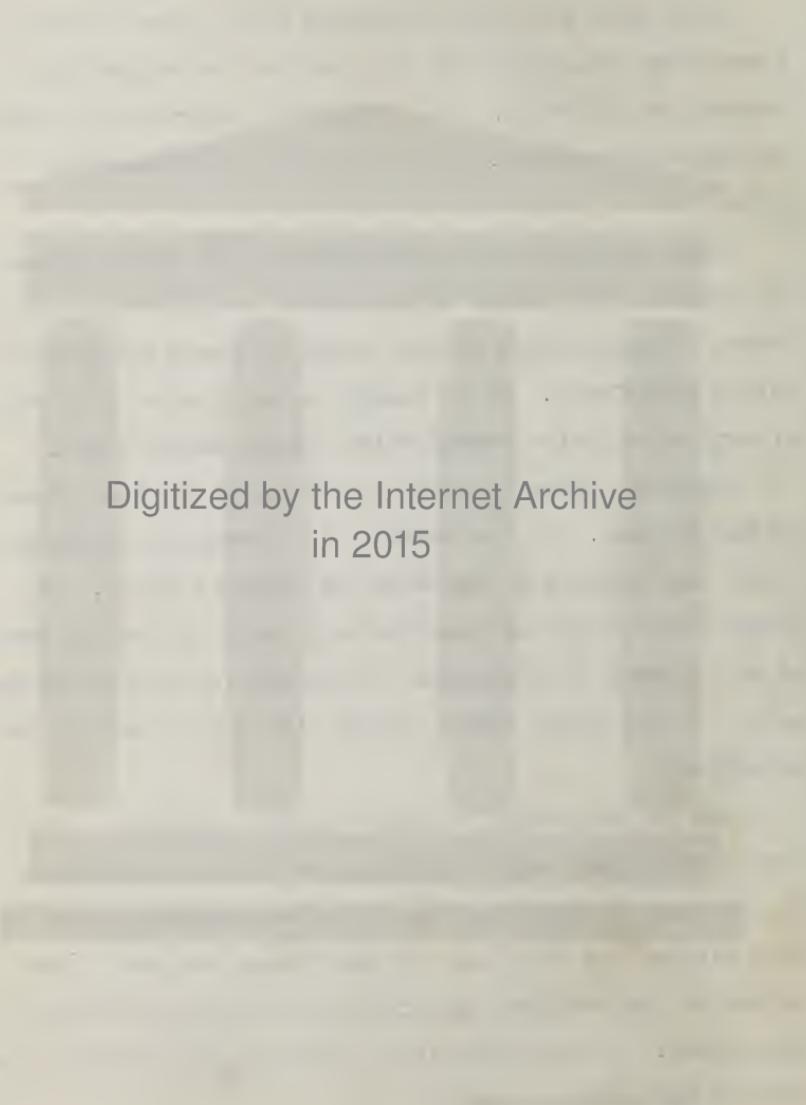
### Preface

This study has been undertaken with a view toward the increasing realization of the place of the supervisor in present day industry. The first-line supervisor or foreman maintains a unique position in the business enterprise.

There has been much discussion of late as to whether the foreman is a member of management or of the working force. Unions insist on the latter, whereas management claims otherwise. He is caught in the middle of a "tug of war" with little constructive action taking place.

Actually, there is little doubt as to the true place of the foreman. To the worker, his foreman is management --the only contact he has with the "front office". In today's vast business organization, every action and word of the foreman is translated to his men in terms of management. If the front office exists, it is only through the supervisor.

What is the reason for this evident confusion? The thesis which this survey advances is that the supervisor must be made to feel that he is on the management team before his job can be placed in its proper category. One method of implementing this feeling is adequate training procedures. If the supervisor is "management-trained", he will be management-conscious.



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## I. Introduction

### A. Background

Training of the industrial supervisor or executive has been under active discussion for over twenty-five years. The first known indication of this type of training was in 1914 when Charles R. Allen conducted conferences with foremen with an eye toward increasing the efficiency of supervision.

Much has progressed since that time. The course itself, at its peak of organization, now consists of a comprehensive analysis of all supervisory responsibilities. Of course, a lot depends upon the size of the firm which institutes the program. In some cases, a non-detailed discussion of a few supervisory responsibilities is sufficient to serve its purpose adequately.

Of great significance in recent years is the increasing amount of attention being given to the training of higher rank executives. From a long-run point of view, this is an exceedingly important development. It had been seen that the training of lower supervisors had often proved ineffective since the "higher ups" failed to appreciate the objectives of this training and therefore refused (perhaps inadvertently) to cooperated with it.

This training for leadership is found in almost any kind of organization: churches, social work, clubs, business enterprises, and many others. There is always some method provided for--no matter how automatic or informal it may be--by which those in leadership capacity are trained



for the purposes of improved efficiency or as preparation for advancement.

However, this is exactly where an analysis of objectives is in order. The usual objective is to stress technical proficiency and skill rather than the capacity to lead others. It is of course recognized that there are unique problems in each organization, but there is one common denominator in all training situations which must be recognized and properly stressed--the human factor. Actually this is a matter of vitalizing and harmonizing the desires and motives of those led. (1)

This matter of human relations which has become increasingly important has its basis in the changing nature of industry itself. With the expansion of industry and the subsequent changes in social structure, it was found that a supervisor required substantially less technical knowledge but a much wider variety of skill in other directions. A supervisor is "management" to the worker. Even at this late date, there are many employers who will not readily concede this fact and who still promote master craftsmen to the rank of foreman without considering their qualifications to handle men, plan, and to organize.

Generally speaking, the major emphasis today is

(1) Tead, Ordway, The Art of Leadership, Whittlesey House, McGraw-Hill, New York, 1935, pp. 272-273



placed on the supervisor's personnel functions. Management now realizes that with a changing class of workers, with a steady growth of unionism, and with increased decentralization of management-worker contact, this aspect of human relations is indispensable as a major portion of any training program.

In instituting a training program, a very real advantage may accrue to the entire management structure. A preparatory analysis of the organization can bring to light any number of management policies or procedures needing change. Such an analysis is always valuable and beneficial to all concerned in the enterprise.

#### B. Definitions of Supervisory Levels

##### 1. General Subdivisions

It is well to set forth at the onset the distinguishing characteristics of the various levels of executive or supervisory capacities. Actually, the differences to be found in executive and supervisory training are only in the externals. The executive group may be older and more "set" in opinions. Their training usually consists mostly of intangibles with the emphasis on human relationships. In lower supervisory levels, the training contains more of concrete production problems. In general, however, the same problems of supervision are considered.

Very broadly, there are three levels to be con-



sidered: pre-supervisors, first-level supervisors, and those in higher managerial capacities.

Pre-supervisory training consists of an introduction to the principles of good supervision for those marked for possible upgrading to first-level positions. Its purpose is to start men thinking as supervisors rather than as craftsmen. Basic principles are emphasized with little stress on complex situations. The course should be able to bring out some indication of the ceiling of promotion for any individual trainee.

In first-level supervisor training, these principles of supervision are applied to concrete problems and cases which are discussed and analyzed. It should be geared to its intrinsic value in day-to-day working relationships.

The program for seasoned supervisors and managers deals with the broader problems of organization and formulation of company policies. Its purpose is mainly that of stimulating better work performance though further advancement may also result.

In order to further clarify the differentiations between the various levels, it is necessary to go into a more specific analysis. We will consider five levels (as an arbitrary break-down): top executive, senior executive, intermediate executive, junior executive, and supervisor and foreman.

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## 2. Top Executive Level

To be found in this top level in an industrial enterprise are the president and other top officers, vice-presidents in charge of engineering, industrial relations, manufacturing, and other similar positions. These titles are descriptive rather than specific since there is no definite standardization of titles of positions among industrial organizations.

Individuals in these capacities discharge major responsibilities and exercise a wide range of authority. They are directly concerned with the formulation and application of the basic policies. Central coordination is established by them between the principal activities. They are delegated practically full authority to carry on their work according to plans which they themselves largely develop.

## 3. Senior Executive Level

In this category are found the titles of chief engineer, factory manager, sales manager, personnel director, etc. These do not have the official rank of top executives, but they carry heavy responsibilities within their spheres of action. They are rated as executive heads of the divisions or departments of which they have charge.

The main task of the senior executive is the breaking down of the company's basic policies in their lines of work into directive regulations. They also have responsibility

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for the development of fundamental procedure for their respective divisions or departments.

#### 4. Intermediate Executive Level

In this level we find such positions as assistant chief engineer, assistant sales manager, employment manager, manufacturing manager, etc. These are the immediate assistants to the senior executives concentrating in particular areas of work where they are specialists.

They are directly responsible for the application of policies and the development of specific procedures. Certain decisions are required and proper performance of work is directed within the specified area.

#### 5. Junior Executive Level

These individuals head smaller units of the enterprise, directing the work of a few assistants or supervisors. They are represented by titles such as branch sales manager, head safety training instructor, chief checker, etc.

The duties entail some decision-making and giving of advice. The work is still executive in that the junior executive does not actually conduct an operation.

#### 6. Supervisor and Foreman Level

This lowest level is the one in immediate charge of workers--the first-line supervision. The slight distinction between the two is that the supervisor is still in a semi-advisory capacity, whereas the foreman actually directs the workers. There are four main functions of this group:



a) getting work done in the time and of the quality set by coordinated planning; b) setting standards of work with specialized units; c) training workers to increase efficiency; and d) handling grievances in the department as soon as they arise. (1)

Figure 1 graphically portrays the various levels discussed above.

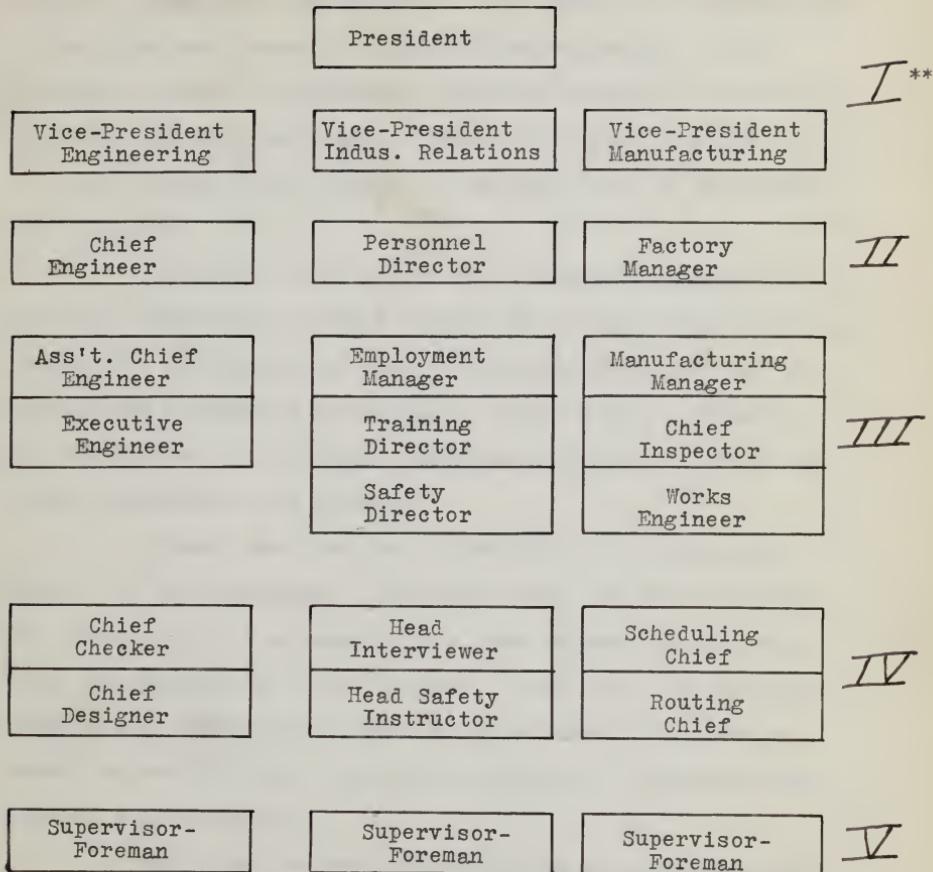
### C. Method of Approach

The preceding section intentionally went into detail in regard to the levels of supervisory positions. It is intended that the differentiations be borne in mind during the following discussion of supervisor training programs.

In this essay, we shall primarily be concerned with the lower supervisory levels rather than the top categories. Using the break-down as employed in the previous section, we will deal mainly with the first-level supervisory training, or the training of junior executives and that of supervisors and foremen. On these levels, we can more exactly set down the formal techniques used and thereby evaluate them more thoroughly. Training on higher levels is apt to be informal and indefinite from firm to firm and more intangible from the point of view of analysis.

(1) Alford, L.P. and Bangs, John R. (Eds.), Production Handbook, Ronald Press, N.Y., 1944, p.38



Figure 1 - Chart of Executive Levels\*

\* Charted from data in Production Handbook, pp. 35-38

\*\* Numbers refer to various levels: I - Top Executive Level; II - Senior Executive Level; III - Intermediate Executive Level; IV - Junior Executive Level; V - Supervisor and Foreman Level.



This is not to say that higher executives have no place in formalized training nor that many of the techniques to be discussed cannot be applied advantageously. This informal method of discussion, "batting around" of problems, and the like is invaluable in these levels as it often is on lower rungs of the ladder, as we shall see in the course of the essay.

However, it is surely the formalized aspects of getting supervisors trained solidly that will increase their chances of attaining top rank positions eventually, and of increasing production efficiency. Since this is actually the foundation of the entire management structure, there we shall concentrate our efforts.

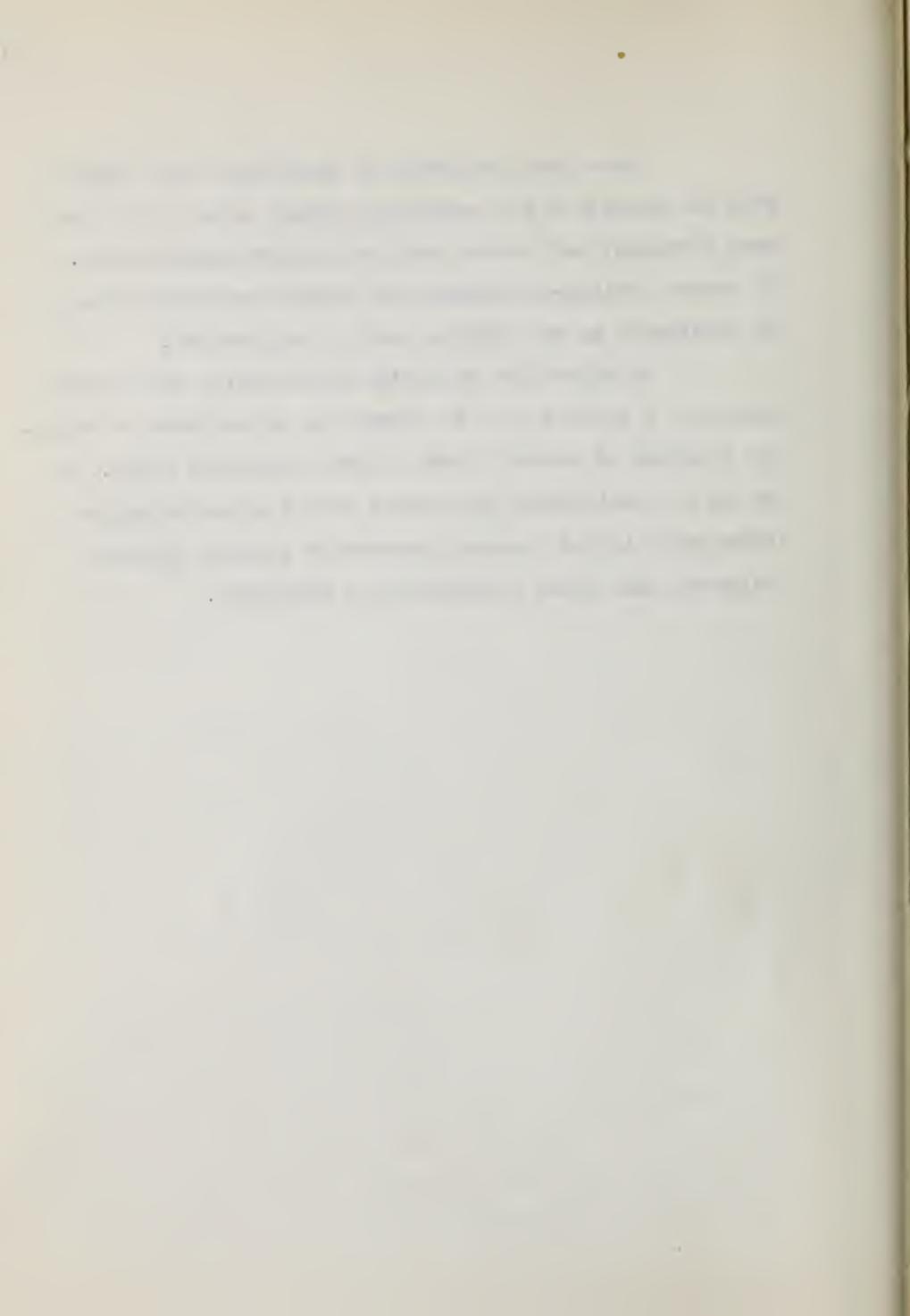
First, the aims and objectives of all such programs will be considered. In other words, we will discuss the qualifications necessary in a good supervisor or executive and objectives of the program. From this, the training program can properly be directed and planned. Top management's responsibilities toward the success of a program will receive its due weight.

The steps in the administration of a program are installation, maintenance, and evaluation. The factors which must invariably be considered are: the preparation of the program; the methods to be used, the trainer, and the learner. The following pages will attempt to cover the material always bearing in mind the relationships among all four factors.



Under the discussion of techniques, most space will be devoted to the conference method which is the one most prevalent and looked upon as the most satisfactory. Of course, follow-up schemes and evaluation methods will be considered as an integral part of any program.

To relate the theoretical discussion with actual practice, a section will be devoted to an analysis of training programs of several firms in the industrial field. As far as is practicable, the survey will include selection techniques, levels trained, content of program, means of follow-up, and other pertinent data obtainable.



## II. Aims and Objectives

### A. Signposts of Supervisory Ability

Many lists have been drawn up which set forth desirable qualities of those in supervisory capacities. Perhaps one of the most explicit is that devised by Johnson which breaks down these qualities into the four major fields of activity of the supervisor and foreman: directing and handling work, setting standards, training of those under him, and handling of human relations. (1) It is imperative that an enterprise know and understand the spirit of such a list before it can adequately proceede with training. The program must succeed in inculcating within the trainee a combination of these traits and requirements.

#### 1. Directing and Handling Men

a) Enough mechanical ability should be had to intelligently supervise the men under the individuals involved. In the case of higher level supervisors, this does not necessarily mean a thorough knowledge of intricate details, but it does mean that the supervisor have a general knowledge and know where to get more detailed information when necessary.

b) The supervisor must possess both versatility and ingenuity in order to cope with new situations which

(1) Johnson, Joseph F., Business and the Man, Alexander Hamilton Institute, N.Y., 1917



may arise.

c) He must have a knowledge of equipment (the extent again depending upon his level of supervision) and a familiarity with modern practices and what is going on in his field.

d) He should have the ability to correlate the activities of his group with other groups. If he is supervising more than one type of activity, there is all the more need for adequate correlation.

e) He must possess the faculty of cooperation to be able to satisfactorily direct his subordinates.

f) He should have an understanding of costs.

g) He must at all times be safety conscious.

## 2. Setting Standards

a) He should have an engineering sense.

b) He should possess a knowledge of job requirements.

c) He should have a sense of relativity in order to properly be able to aid in setting standards.

## 3. Training Duties

a) He should have some sort of teaching ability which must be learned through proper training.

b) He must have a thorough knowledge of the subjects he is required to teach.

c) Akin to his teaching ability, the supervisor must have patience and perseverance.



d) He must have the learned ability to develop underlings.

#### 4. Handling Human Relations

a) A supervisor must have a sympathetic understanding of human nature. He is a leader of men; therefore he must know how to guide them to best advantage for all concerned.

b) He must be trustworthy to the fullest extent. Since the supervisor is in a position of trust--both to his company and to his subordinates--he should conduct himself accordingly.

c) Naturally, any individual in a supervisory position must be fair and free from all prejudice.

d) The power of discernment is an important factor. The supervisor must be quick to notice things around him in regard to his subordinates. A discerning supervisor can prevent many a crisis within his activity.

e) It goes without saying that the supervisor be thoroughly familiar with company policy. In addition, he must have the ability to translate these company policies into practical terms.

#### 5. Top Executive Qualities

Qualities necessary in the top executive are also listed by Johnson and are similar to those mentioned by many others:

a) creative power



- b) abundant energy
- c) initiative
- d) courage
- e) high ideals
- f) honor and integrity
- g) independence
- h) sense of responsibility
- i) executive ability

#### B. Objectives of Supervisory Training

##### 1. Assumptions of a Training Program

Before an enterprise can definitely set out upon a training program, there are some assumptions which must be realized by the interested members of the firm.

First, trainees themselves must feel that there is a need to learn. This will act as a motivational device and enable results of a more satisfactory nature. It is, of course, possible and desirable to make prospective trainees conscious of the need by building the program around their interests and qualifications. The training staff has to be a super-salesman to accomplish this satisfactorily.

Second, it must be understood that training, in the main, is a line and not a staff responsibility. The function of the staff should be to advise, teach, and perhaps to help organize a special program; but the actual administration phase of training belongs in the hands of



the line organization.

Third, it should be almost axiomatic that training in supervisory skills cannot be taught merely by the imparting of information. A firm who relies on mere words in teaching management situations runs the risk of dangerous misinterpretations, conflicts, and inconsistencies.

Last, it must constantly be borne in mind that learning is a direct function of its consequences. It is imperative that what is learned must be practicable. (1)

## 2. Ultimate Aims

The main objective of supervisor training is to increase the total efficiency of work in all directions. The character and scope of a supervisor's job is such that the training (or lack of it!) affects not only the efficiency of the supervisor himself but also that of all ranks under him. In addition, inter-departmental relationships are likewise affected.

In order to accomplish this prime objective, the trainee must be given a more complete conception of his varied responsibilities. He must learn the viewpoint of increased quantity and quality through a keener appreciation of modern methods of handling labor, materials, and equipment.

The training must acquaint the subject with the

(1) McGregor, Douglas, "Reevaluation of Training for Management Skills", American Management Association, Personnel Series, Bulletin #104



policies, plans, and ideals of the organization so that he may better interpret them to his subordinates. This will provide him with a broader understanding of the aims of the entire enterprise and his relation to it.

Along with the above, the trainee should learn the broader aspects of the principles of efficient business management and possibly even the fundamentals of business economics.

Not only must the trainee learn these things himself, but he should also obtain some operative principles which he will find helpful in training workers on the job --an important foreman function. All in all, his training will prepare him for greater responsibility within the organization.

Theoretically, we can also cite the educational objectives of the training program. These are listed by Beckman (1) as follows:

- a) correlation of new facts with past learning and experience.
- b) application of newly absorbed facts.
- c) development of critical judgment.
- d) increase in trainee's store of knowledge.
- e) stimulation of a desire for further study.

We may also look at these aims and objectives from

(1) Beckman, R.O., How to Train Supervisors, Harper and Brothers, N.Y., 1942



from the viewpoint of human relations as does Tead (1):

- a) a knowledge of the general characteristics of human nature as are set forth in general and applied psychology.
- b) self-knowledge of one's own unique combination of qualities with their varying degrees of strength and weaknesses.
- c) a working grasp of the right attitude to possess in dealing with people.
- d) an ability to apply all of this knowledge to the mobilizing of energy and enthusiasm for the special objectives of the organization.
- e) deliberate efforts at broadening of the total personality in a cultural direction.

### 3. Scope of Objectives

It should be noted that this discussion seems to be centered upon the objectives of first-line supervision. This is true, generally, for reasons mentioned in the previous chapter. (2)

However, from top executives down to the first-line foreman, managers and supervisors have common duties and problems which arise from the fact that they are all engaged in directing the work of people. The concern of organized supervisor training programs are particularly these common duties and problems. They may (and certainly do) differ in degree, but rarely in kind.

(1) Tead, Ordway, op. cit.

(2) See pages 12, 14



### C. The Responsibilities of Top Management

Top management has definite responsibilities when it commences a training program of this type. First of all, it should have personal responsibility for the selection, training, and development of those who report directly to it. Aside from this, it should have personal knowledge of the abilities and the stage of development of those available as potential relief for the top group.

The attitude of top management determines the success of any plan. It must actively create and disseminate a philosophy that supervisors are a vital part of the management structure. Then an organization must be established which is charged with proper authority to install and continue the program. The line organization needs substantial aid in order to carry through a complete program for the development of supervisors. (1)

The next step is for top management to lend its own personal prestige and encouragement to the program. It should "sell" the program rather than "order" it. The program must then be guided to the constructive performance of its function with frequent follow-up on progress. The results of the program should be used consistently, with the role of "favorites" eliminated, or the entire plan is defeated at that point.

(1) It might here be noted that supervisors will accept the program more readily if they have a considerable portion of participation in its planning and guidance.



Top management has an important function in assuring a regular systematic review of all employees to discover those who show a potential for supervisory jobs. These should be given a chance by a chance to prove their worths under a pre-supervisory training plan.



### III. Selection of Trainees

#### A. General Introduction

Selection is the first step in developing an adequate supply of well-qualified personnel in responsible supervisory positions. There is no simple method for selecting men for these jobs. It would be impractical to try to look for one method of selection which would be applicable to all enterprises at any given time. This is true in any phase of the program, including setting up of objectives, techniques used, and methods of follow-up. Many of the methods used in industry can be employed provided that they may be coordinated in a well-functional "whole".

Individual analysis and attention according to the objectives of the enterprise is the ideal in the selection process, from the lowest to the very highest managerial ranks. We repeat that no company can take and use just any mental examination, rating scale, or training program and expect to get accurate results. It is preferable that methods grow out of a careful study of the industry and the company.

#### B. Sources of Recruitment

Most firms emphasize the importance of developing and selecting rank-and-file employees when possible; or, in the case of higher levels, from within the organization. It



has been found that this incentive factor is a much needed and worth-while aspect in the enterprise.

However, to an increasing extent, colleges and technical schools are becoming a welcome source of candidates and tend to furnish a desirable type of individual. Many companies take a substantial number of selected college graduates each year for training. Some of these send representatives to the leading schools to interest, interview, and eventually sign up selected graduates. Nevertheless, progressive firms make sure that men in their own ranks are given at least an equal opportunity with college graduates to receive advancement to responsible positions.

Of course, the other sources of recruitment are not neglected if the proper circumstances presents itself. Newspaper advertisements, employment agencies, etc. have their places. Some companies command the prestige to be able to attract an adequate number of good men who apply directly to the company itself.

In the study made by the Graduate School of Business of Stanford University (1), all companies considered recognized the hazard to morale in bringing outsiders to fill responsible positions toward which insiders might reasonably aspire.

(1) Holden, Paul E., Fish, Lounsbury S., and Smith, Herbert L., Top Management Organization and Control, Stanford University Press, 1941



It might be mentioned here that a company should make every effort to weed out inadequate candidates during the selection process before they are hired in a permanent position, rather than waste time and money in putting them through a comprehensive and costly training program and then finding them deficient.

### C. The Importance of Job Analysis

One of the most important factors of late in fair selection is a clear knowledge of the job requirements of the position for which men are being chosen. Practically speaking, it is almost inconceivable that the correct man can be chosen unless an adequate job analysis is performed. Under such a plan, a job description and a job evaluation are drawn up for each job under consideration in the plant. (1) These are yardsticks by which the candidate can effectively be measured. The traditional methods of the appointment of the "best" worker in the department are on their way out. Also, the seniority basis certainly cannot claim to be able to recognize the responsibilities of the special qualities needed for supervision.

In determining and defining standards of work

(1) Job Description: a written list of the duties, responsibilities, and requirements of a job.

Job Specification: determination of the human qualifications required for the effective performance of the job.



expected and task requirements, both management and supervisors can readily see what qualifications are essential to successful performance. The former can plan accurate training programs according to the requirements of the particular supervisory job and also simplify selection. The supervisor himself knows just what is expected of him and can devote his full energies toward proper fulfillment of his job.

In addition, job analysis makes possible clearly defined lines of advancement and promotion, furnishing an incentive to the supervisor.

For management, the efficiency of the entire organization is enhanced through this standardization of supervisory operation. As mentioned, the work of selection and placement is greatly aided, permitting something close to scientific technique in choosing the right man for the right job. The planning and scheduling operations are facilitated by the defining of responsibilities; a shifting of responsibility is made almost non-existent.

Associated with the obvious advantage of job analysis in selection, the management also stands to gain in a more efficient training program--not only in being able to plan according to the resultant job requirements, but also in the saving of time, money, and effort in the training of the right individual.



#### D. Testing and Rating

The principal objective of testing and rating candidates for supervisory positions is to study them from as many different angles and in as many different environments as possible. A supervisor's job takes in almost all aspects of the individual's make-up. If a good number of these can be known before actual selection, the company can, in a way, almost pre-determine success on the job--provided that the requirements of the job are known in advance.

##### 1. Testing

The use of tests as a partial means of selection is often used for candidates in the lower supervisory levels. They can not be overlooked as an auxiliary aid. Tests, however, must be used with caution and must be administered and evaluated by a skilled person. There is no basis for the belief that since a test was at one time successful in one company, it will therefore automatically be successful in another.

A proper testing program has been used with great success by numerous companies. What are the factors which are looked for from test results? These are numerous and should cover a multitude of items. Some of these are discussed in the course of this section. The following types of tests have been used by most companies employing this auxiliary means of selection:



- a) intelligence tests
- b) capacity tests
- c) adaptability tests
- d) mental maturity tests
- e) vocational interest inventory
- f) personality tests
- g) personal audit tests
- h) specialized tests depending upon the position to be filled.

Each of the above must be broken down in turn.

For instance, Dr. Rexford B. Hersey, in breaking down a mental abilities and characteristics test, came up with the following sub-divisions: general information (on the industry and otherwise); language (use of words in analyzing, reasoning, and solving); power of concentration (ability to understand and carry out instructions; mathematics or simple arithmetic formulae; objects or their reproduction (basis of technical engineering work); and perception. (1) In regard to the last point, Hersey claims that 85% of executive decisions rest on accuracy and speed of perception, 5% on snap judgment, and 10% on unhurried analysis and reasoning.

## 2. Rating Scales

From the results of these tests plus the results

(1) Hersey, Rexford B., "Problems in Selecting and Training Supervisors", American Management Association, Personnel Series, Bulletin #47



sults of records, interviews, physical examinations, and other devices, a composite rating scale can be determined for each man. As many people as are practical can fill in these forms in order to present a collective judgment. Hersey suggests that at least these three people should be called upon for their opinions: the immediate supervisor of the candidate, a superior of the immediate supervisor, and a person on a par with the candidate who has no jurisdiction over him. Figures 2 and 3 give some idea as to the types of scales which can be and are used.



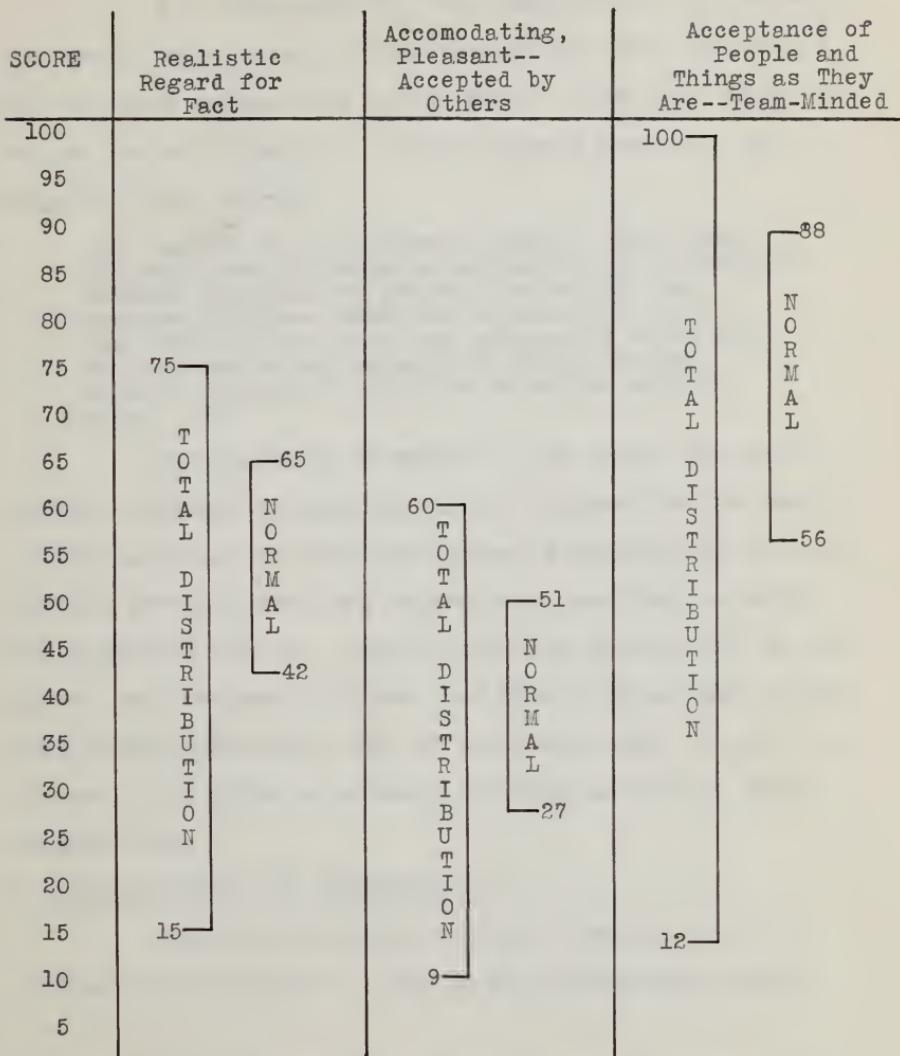
Figure 2 - Suggested Rating Scale\*

Characteristics	Estimate					Remarks
	Very Good	Good	Fair	Poor	Very Poor	
Ability to Get Cooperation						
Alertness						
Courteousness						
Decisiveness						
Enthusiasm						
Foresight						
Initiative						
Judgment						
Knowledge of Job						
Leadership						
Loyalty						
Open-Mindedness						
Poise, Dignity						
Punctuality						
Resourcefulness						
Self-Control						
Sense of Humor						
Sincerity						
Tact						
Thoroughness						
General Remarks						

\*Donald, W.J. (Ed.), Handbook of Business Administration, McGraw-Hill Book Co., N.Y., 1931, p.1194



Figure 3 - Temperament Inventory\*  
(Personality Norms and Ranges)



\* B.F. Goodrich and Company, Akron Operations



### E. Elements of a Selection Program

The correctness of the judgment used in deciding who shall be selected to fill supervisory jobs determines the ultimate success for any program. Naturally, there is no pre-tested formula to provide correct answers. One authority has stated:

The quality of the judgment used in appraising the abilities of human beings makes the difference between irregular or doubtful selection and consistently good selection...(However) there are certain procedures and safeguards which can be followed by any managerial group charged with the responsibility for selecting supervisors. (1)

The practices referred to can reduce the margin of error created by such things as confusion in the qualifications sought in the supervisors, dissimilarity of work between previous work and supervisory positions to which the candidate aspires, unpredictability of reaction to new supervisory responsibilities, and bias or ignorance on the part of the selectors. One of the first tasks for the selectors is to agree on a basis for judging ability and potentiality.

#### 1. Qualifications of Supervisors

This aspect of the selection process has been discussed previously (2), and it is not necessary to go

(1) "Selection of Supervisors", California Institute of Technology, Industrial Relations Section, Bulletin #9, 1944

(2) See Chapter II, Part A

Second, according to the definition of

the term "natural resources," it is not the land itself which is the resource,

but the services which it provides. The same piece

of land can be used for different purposes, and the same purpose can be served by different pieces of land.

Third, the concept of natural resources is not limited to

terrestrial resources, but also includes water, air, and energy resources.

Fourth, natural resources are not limited to

living things, but also include minerals, rocks, and other non-living things.

Fifth, natural resources are not limited to

the surface of the earth, but also include the atmosphere and the oceans.

Finally, natural resources are not limited to

the present, but also include the potential for future development.

Therefore, natural resources are defined as those materials and energy sources which are used or may be used to meet the needs of man and his society.

These resources are used directly or indirectly for economic, social, cultural, and other purposes.

The following sections will discuss some of the more common natural resources and their uses.

Water is one of the most important natural resources.

It is used for drinking, cooking, washing, and other domestic purposes.

It is also used for industrial purposes, such as

mining, manufacturing, and agriculture.

Water is also used for recreation, such as swimming and boating.

Land is another important natural resource.

It is used for agriculture, forestry, and other

industrial purposes, such as mining and

manufacturing.

Minerals are also important natural resources.

They are used for construction, such as

building houses, roads, and bridges.

Energy is another important natural resource.

It is used for heating, cooling, and

power generation, such as electricity and

gasoline.

into it again at this point. Let it suffice to say that much confusion and inconsistency of judgment can be avoided if it is known in advance just what to look for in the candidate.

## 2. Collective Judgment

This is an important technique for the improving of individual human judgment. The combined judgment of qualified and well-informed men is likely to be more consistently correct than that of any single individual of the group. The procedure can assure maximum opportunity for advancement strictly in accordance with one's abilities. Another basic advantage is that it brings together the experience and the information of all branches of business in the determination of a sound basis or common denominator for consideration.

The means of collective selection as are present in many of the best programs are as follows:

- a) nominations by supervisors at the level just above the candidate;
- b) review of nominations, ratings, and comments by a committee appointed for this basis;
- c) selection by the committee on the basis of all information available;
- d) final selection by the immediate superior who will supervise the prospective candidate.

The last point deserves special emphasis. No



matter how fool-proof selection may be, it is almost universally conceded that the new immediate supervisor must ultimately approve of the selection before the choice is final.

### 3. Adequate Records

In order to further assure that the collective judgment be objective to as great an extent as possible, it is necessary that adequate records be available. The first general category of records is the job analysis underlining the duties and responsibilities of the job and the qualifications necessary in the man who is to fill the job. (1)

The other set of records should tell as much as possible about the qualifications and performance of the candidate for the job himself. There are many such records which can be present if the proper machinery has been developed in the firm.

Much of the candidate's personal data, work history, and experience will be a part of his permanent file, started on the commencement of his employment with the company and added to as he acquired experience. Such factors as health, age, family status, education, work experience, and so forth are most important to an objective basis for selection.

(1) See Part C of this chapter for a further elaboration of the job analysis phase.



Tests and examination results are called for if this auxiliary means of selection is employed. However, to a great degree, they usually play a comparatively insignificant part in the selection of supervisors from within the plant--increasingly so, as previously noted, as higher levels of supervisory capacities are considered. Instead, the cumulative record of performance in the company is felt to be a superior means. In a number of firms studied in one research project, the general reaction to the development of tests for supervisors was that the benefits would not equal the cost, even if enough experience could be gained to validate the tests and if a criterion could be determined. (1)

The personal interview may be a part of a phase of the process of collective judgment. The results should be placed into the personal record. A standard interview form could be worked out in order to assure that the desired information will be obtained from the interview.

Informal comments of superiors, if systematically recorded, can be a valuable source of information applicable to selection. They lack the standardization and comparability of formal ratings, but they do present more spontaneity and lack of the "impression-making" factor. It cannot be overemphasized that results must be recorded

(1) California Institute of Technology, Bulletin #9, op. cit., p. 15



as soon as possible in order to prove of any value.

The formal rating scale and forms can be touched on again here in order to show their place within the scope of maintenance of adequate record keeping. This is a precise technique which readily lends itself to comparability --as opposed to informal ratings. Since rating procedures are analytical in nature, these may contribute the most to defining personality (usually considered the focal point of proper supervisory selection).

#### 4. Demonstration Devices

One of the more superior criteria for selection is the technique of actual demonstration of supervisory ability. It is difficult to draw the line here between selection and actual training. This procedure can be used in either or both, though at this point it will be viewed from the focus of the selection viewpoint. These devices are primarily designed to provide for the display of supervisory qualifications by placing the candidate in a situation in which he has the opportunity to exercise some of the abilities of the supervisor.

Four grouping can be evolved: temporary delegation of responsibility and authority; experience in a staff department; and courses for the purpose of spotting supervisory ability.

In the delegation of temporary authority technique, the rotation process is often employed whereby the



individual is placed under successive observation of a number of supervisors on various types of work. Relief supervision and understudying serves the same purpose though they are usually of short duration. Therefore careful, systematic observation must be assured.

Partial delegation is used for giving the candidate practice in certain phases of supervisory work. Duties which may be so delegated are methods improvement and work simplification, safety, job instruction, interviewing, rating, or preparation of forms and reports.

Experience in a staff department gives the prospective supervisor contact with supervisors and executives both inside and outside of the line organization. Duties most frequently delegated in this way include setting of time standards and rates, job analysis, personnel and industrial relations work, or production control.

Where organized courses are used as a selection device, the participants understand in advance that they are on trial and that there is no assurance of promotion on an automatic basis. Qualities tested by the courses are ability to learn, ability to deal with new situations and problems, and the capacity for clear statement before a group or in written reports and examinations.



#### F. Pseudo-Scientific Selection

It is interesting to note that many employers today still use some selection methods which years ago were employed almost exclusively. The color of one's hair or the weight and height of the candidate often play an important part (although it is not readily admitted). Most of us have a picture in our minds of the "executive" .. He is probably middle-aged, stocky, of good height, and has greying hair. Is it not plausible that a candidate applying for a supervisory job be rejected if he fails to meet specifications pre-set by the selector's mind's eye?

Gowin (1) lists some of the techniques used in the early part of the century by employers in the selection process. His book (published in 1918) devotes considerable space to some of these which are discussed in all seriousness:

- a) astrology
- b) clairvoyance
- c) spasmotamancy
- d) chrigonomy
- e) phrenology
- f) palmistry
- g) chiography
- h) intuition

(1) Gowin, Enoch B., The Selection and Training of the Business Executive, The Macmillan Co., N.Y., 1918, p.61



At about that same time, an advertisement appeared in a trade journal want ad column:

Wanted, a first class man with experience for permanent position on staff of Vice President to shape and direct the advertising policy of a trunk line railroad. To save time and trouble to both applicant and employer, kindly send in photographs--one full length, one exact profile view (bust) and one front view (bust) full face holding hands close in front of body; one palm outward and other hand inward. Call for recommendation and personal interview will follow. (1)

It is encouraging that so much progress has been made since 1917 in the selection process. There is little doubt, however, that some of these influences do enter into selection--unconscious though they may be.

(1) Printer's Ink, October 11, 1947



#### IV. Training Techniques

##### A. Installing and Maintaining the Program

###### 1. Responsibility for Training

The burden of responsibility for the training program must be recognized to fall upon the line organization. In many instances, it is on the department itself, although supervisor training is usually the responsibility of higher line officials rather than of department heads. The staff training unit of the personnel department is present to plan, advise, and assist (as distinguished from administering or "doing"). It is up to them to keep the program up to an original standard and within the original conception.

The functions and duties of the training staff can be summarized under six headings:

- a) assistance in developing training methods
- b) preparation of suitable material
- c) coordination of training among departments
- d) encouragement of the extension of training
- e) diffusion of the results of training and keeping management informed
- f) training of conference leaders

To repeat, the training staff helps to plan the program; but this can not justly be taken to relieve the line organization of its responsibilities in the actual administration or "doing" phase.

the first time in the history of the world, the  
whole of the human race has been gathered  
together in one place.

It is a remarkable fact that the whole  
of the human race has been gathered  
together in one place. I have no doubt it would  
have been much more difficult to have done  
it had it not been for the great number of  
countries which have adopted the same policy of  
freedom and right. It is now easier to do it, because  
the whole of the world is now under one government  
and one law. This is a great blessing to all  
the people of the world.

It is a great blessing to all the people of the world  
that they are now under one government and  
one law.

It is a great blessing to all the people of the world  
that they are now under one government and  
one law.

It is a great blessing to all the people of the world  
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one law.

## 2. Level at Which to Begin Training

The majority of firms start their training programs at the lower supervisory levels. Theoretically, however, they should start at the point where there is the greatest need.

In regard to the last statement, some companies form representatives from the various supervisory levels into an advisory committee which is given responsibility for determining training needs and for submitting the program for management's approval.

## 3. Costs of the Program

Naturally, the costs very greatly depending on the nature and extent of the program. There are two areas into which all costs fall. First, there are the costs of instituting a program. These involve the expense of a training technician, the time of the industrial relations department, secretarial and clerical expenses, time of the trainees and guiding executives, supplies and materials, and costs of preparing conference rooms.

On the other hand, the costs of continuing the program must also be considered. These include much of the same items as above, although the amounts of each are scaled to suit the requirements after the program reaches equilibrium.

The costs of the program can be either out-of-the-pocket or allocated. The former are those which are



incurred by the company in addition to those expenditures ordinarily entailed without the program--in other words, direct actual expenses of the program. Allocated costs are those which are not occasioned directly by the training program, but which are charged to it for accounting purposes. (1)

A form which can be used for estimating the cost of supervisory training is found in Figure 4.

(1) Examples of allocated costs are such items as rent, heat, light, electricity, and other similar expenses which are allocated among the various activities of the organization.



Figure 4

Form for Estimating the Cost of Supervisory Training\*Training for \_\_\_\_\_ supervisors to be given in \_\_\_\_\_ sessions  
(no.) (no.)

COST ITEM	OUT-OF-POCKET COSTS		ALLOCATED COSTS	
	Initial	Annual	Initial	Annual
Industrial relations director--time for planning, organizing, and establishing program	-----	-----	-----	-----
Training technician--time for planning and organizing program and for training sessions	-----	-----	-----	-----
Secretarial and clerical assistance	-----	-----	-----	-----
Time for Supervisory Conference Committee in planning program	-----	-----	-----	-----
Time of Supervisors spent in training sessions and activities	-----	-----	-----	-----
Preparation of the Conference Room	-----	-----	-----	-----
Supplies and equipment; clerical supplies, training materials and equipment	-----	-----	-----	-----
TOTAL COST	-----	-----	-----	-----
	This amount is actual additional cost for presenting program		This amount is cost assigned to program for accounting	

\* California Institute of Technology, Industrial Relations Section, Bulletin #10, "Training of Supervisors", 1944, p. 69

GENERAL INFORMATION

NAME: *John C. Clegg* ADDRESS: *1000 N. 10th St., Phoenix, Arizona*

AGE: *35* GENDER: *Male* MARITAL STATUS: *Married*

EDUCATION: *High school graduate* OCCUPATION: *Businessman*

RELIGION: *Methodist* POLITICAL AFFILIATION: *Independent*

EMPLOYMENT HISTORY: *Employed by the Phoenix Journal Co. as a reporter for 10 years.*

RESIDENCE HISTORY: *Resided in Phoenix since 1925. Previous residence was in San Francisco, California, where he worked for the San Francisco Examiner.*

EDUCATION: *Attended public schools in San Francisco and graduated from the University of California at Berkeley.*

EMPLOYMENT: *Worked for the San Francisco Examiner as a reporter for 10 years. Then moved to Phoenix, Arizona, where he has been working for the Phoenix Journal Co. as a reporter for 10 years.*

RELATIONSHIPS: *Married to *Mary Clegg*, a native of San Francisco, California. They have two children, *John Clegg Jr.* and *Mary Clegg*.*

INTERESTS: *Reading, writing, and traveling.*

EXTRA ACTIVITIES: *Member of the Phoenix Chamber of Commerce, the Phoenix Journal Club, and the Phoenix Rotary Club.*

### B. Content of Training

It is not possible to set down the exact content of contemplated training programs in one list. This must be established in each company according to certain specific objectives which must be met. However, there are general principles which can be formulated in regard to the content of programs.

First of all, each section of the program should have a planned place in the over-all scheme of supervisory development. There must be a proper relationship and connection between the various areas.

It is also important that any new information and principles be carefully related to those which have already been mastered. This is a prime requisite of pedagogy and can easily be carried over into this sphere where the supervisor (or prospective supervisor) must be taught supervision. There must be a proper perspective of the relationships between new concepts and the previously learned responsibilities and duties--a continuity factor. An over-all plan should be developed for this purpose.

Third, as an aid in considering the broad scope of supervisor training, the skills necessary to a supervisor can be broken down into groups. For each such group, there is an appropriate subject matter for training. A suggested scheme of this sort is tabulated in Figure 5.

A word of caution might be inserted at this point.



Figure 5 - Areas of Training for Supervisors\*

<u>Skill or Knowledge</u>	<u>Subject of Training</u>
DEPARTMENT OPERATION: How to perform the jobs to be supervised	Training usually taken care of through work experience, or apprenticeship on the job.
TECHNICAL TRAINING: Theory and practice of operation of equipment in department	Usually acquired through education and experience on job; may receive formal technical training
COMPANY POLICIES, ORGANIZATION, AND PROCEDURES	Duties and responsibilities of a supervisor Company organization (line, staff) Company policies; background and reasons
PRODUCTION SKILLS: Methods Improvement	Standard procedures; elements of job methods study
Job Analysis	Technique of preparing job descriptions and specifications
Production Control	Principles of planning and scheduling; production control procedures
Cost Control	Elements of cost; means of control
Quality Control	Determining work standards, holding output to specifications; preventive quality control
INDUSTRIAL RELATIONS SKILLS Selection and placement	Principles and criteria of selection; use of rating techniques; specifications, induction

(Continued on next page)



Areas of Training for Supervisors (Continued)

<u>Skill or Knowledge</u>	<u>Subject of Training</u>
Training and Developing	Teaching methods; creating interest; breaking down of job; presenting jobs in proper sequence for learning
Wage Recommendations	Job classifications or evaluation; employee rating
Safety and Accident Prevention	Safety rules and devices; safe work practice; workmen's compensation; conducting safety program
Employee Relations	Elements of human behavior; principles of leadership; grievance procedure; relations with union representatives
CURRENT INFORMATION	A continuous program of acquainting supervisors with changes and improvements in any of the items mentioned above, and the introduction of new developments such as clauses in labor agreements, legislation, new procedures, etc.

\* California Institute of Technology, Bulletin #10, op. cit., pp. 20-21



Once an outline as above is constructed, it can not be carried out piece by piece from beginning to end as such. If it were, individual differences and the dynamic nature of training would be lost from sight. The process of encouraging the development of abilities cannot be mechanized. The program must be dynamic enough to take the supervisor as an individual, draw out his pertinent interests, information, and knowledge, and to give a basis for the development of his particular qualifications in a direction most useful to his company.

### C. Training Methods

There are an infinite number of methods for supervisor training which have been used at one time or another with a fair degree of success. For the purposes of this paper, we will consider the training techniques under the following headings: individual instruction (under-study and rotation), conference, lecture, lecture-conference, case method, classroom instruction, practice sessions, printed material, and visual aids.

#### 1. Individual Instruction

This technique may be part of the selection process, and it has been treated as such in Chapter III. (1) In actual training, it is designed to improve particular skills and traits which promotion to supervisory levels

(1) See pages 38-39



would ordinarily require.

The informal type is probably the most common. It is highly personalized and depends on the compatibility and mutual respect on the parts of the trainer and trainee for its success. The cost is high, but the advantages are often well worth the expense. However, it takes a comparatively long time to do full justice to the parties concerned. There are many problems involved in supervision which are unique; they do not occur frequently enough in the course of this highly personalized instruction to provide necessary experience.

The understudy method is the oldest and the most common of the more formal types of individual instruction. It is a direct outgrowth of the master-helper or apprentice mode of training. Its training value lies in the daily instructions and experiences which will arise. The weaknesses of this plan are glaring. The area of training can not progress beyond the attainments of the trainer. This disadvantage has become all the more pronounced with the increased specialization of each executive. The executive doing the training necessarily has typical reactions and attitudes of a specialist in his given field.

With the advent of intense specialization, it was inevitable that some sort of a rotation of assignment be evolved. This does away with the weakness of the understudy in one phase, but adds new problems in others. Not all



executives are equally (if at all) effective at training. Wide gaps may result to the rotating trainee; but certainly the advantage over the previous method can readily be seen.

There are some other fundamental disadvantages of the rotation system which cannot be overlooked. It encourages a strict observational nature to the training. Since a new person cannot walk into a department and take over the reins of a unit without producing worker dissatisfaction, a "hands off" policy can be the result. Aside from this, a temporary trainee can often upset departmental routine, thereby creating more problems than benefits.

A possible solution to the above could be the setting up of a simple job analysis of the trainee's duties as he moves from department to department. This would establish a definite routine to be followed which could eliminate some of the aforementioned problems.

## 2. The Conference

The conference method is generally the most popular of all--increasingly so in recent years. It is probably also the most successful when used properly. This consists of periodic informal meeting at which situations and problems of common interest are discussed. The idea is to reach or formulate a solution through contributions of all members of the group.

The advantages become ~~obvious~~ immediately obvious.



The conference is free of any taints of formality which are commonly associated with many other types of training; the subject matter necessarily is of immediate interest to the supervisors; active participation of all conferees is solicited; and, of equal importance, the level of discussion is closely related to their learning speed since they themselves do most of the talking.

The conference method is not suited to the imparting of factual and technical material to a group. Rather it is designed to the development of the ability to analyze problems and to think clearly in applying solutions.

Contributions of the conference toward cooperative management are great since it provides an easy and efficient channel for the interchange of ideas from one level to another. (1)

### 3. The Lecture

The lecture is used as a means of conveying information to a group which is not familiar enough with the material to attempt discussion. It can also be used for variety as an occasional interruption to a conference series. The lecture provides a means of rapid coverage at a minimum cost. Some typical topics which can be covered to best advantage by this method are: company organization and

(1) Because of the importance attributed to the conference method and the interest engendered by it, Chapter V will be devoted entirely to this technique.



policies to a new group, procedures used in other departments, special or technical subjects, and preliminary background in introducing any new subjects in the training program.

Advantages attributed to the lecture are those of reliability of information and an unrestricted number which the technique can accommodate. On the other side of the picture, the lecture does not leave room for constructive thinking or discussion. The speaker must proceed according to the mean level of the group (if he can find it--a difficult task!) which indicates that he will be over the heads of some and too elementary for others. Also, a lack of continuity will result unless the same individual presides at each session. However, the lecture is most advantageous when used for "lecturable" topics.

#### 4. The Lecture-Conference

The lecture can often be combined very satisfactorily with the conference. New material and principles are presented in lecture form as an introduction to a conference session where these new principles are applied to the group problems.

In the hands of a skillful leader who can judge the ability of his group to absorb lecture material, the shift to the conference from the lecture can be made most beneficially to all concerned.

By means of the lecture-conference combination, the theoretical presentation can be discussed and thrashed



out in practical terms.

#### 5. The Case Method

Closely akin to the conference is the case method of presentation. In one method, each case consists of one or two paragraphs which is handed to the trainees. Following the case description is a series of true-and-false statements which include possible actions or attitudes, principles which could be followed, and decisions the supervisor could make. The procedure followed is:

- a) case studies are presented prior to the conference in a folio which includes a statement of the purpose of the conference and the procedure to be followed
- b) the supervisors are allowed fifteen to twenty minutes after which answers are collected and tabulated
- c) each statement is discussed by the group
- d) when there is a difference of opinion, it is assumed that the point merits additional discussion.

Although this method (1) does not instruct in the technical processes on how to handle his next specific problem, it is effective in training the supervisor to take an analytic approach to personnel and other matters pertinent to his job.

(1) Dodd, Alvin E. and Rice, James O. (Eds.), How to Train Workers for War Industries, Harper and Bros., N.Y., 1942



## 6. Classroom Instruction

Since this technique is usually used as an auxiliary to other forms of training, not much space will be devoted to it here. The classroom method is best suited to subjects which must be presented in an elementary manner. It follows the usual pattern of assignments and recitations, and it is highly unpopular with persons in supervisory capacities when used for other than highly technical instruction.

## 7. Practice Sessions

Practice sessions is a technique used by the Owens-Corning Fiberglas Corporation--one that cannot be classified with any of the other methods, but which certainly deserves adequate mention.

The entire training group is divided into sub-groups of three each. The sub-group represents a supervisor, a subordinate, and an observer-critic. Everyday supervisory problems are give to each trio, and the "supervisor" and the "subordinate" act out the problem with solutions as though it were an actual situation. The observer-critics report on how well the groups handle each problem and how their approaches might be improved. The various assignments are rotated for each problem so that all may get practice in the several phases.

All of the practice sessions are recorded and played back at the end of the session in order to give each



trainee a chance to objectively criticize his own performance and those of others.

The technique has been quite successful at Owens-Corning in developing actual "know-how" in the trainees. (1)

#### 8. Printed Material

This is also an auxiliary method which may be used in combination with others. It consists of the reading of texts or references, or perhaps some form of correspondence study.

The advantages are most important to a small organization since the method does not entail the setting up of a group and can be done as desired at a minimum cost. Information assigned can be restricted to pertinent facts only.

Disadvantages are many: it requires great perseverance; few people are able to complete an involved study--or even to absorb it; the method lacks the stimulus of group contact, much as it lacks interpretation of the instructor.

Printed material must be considered a very minor method unless used as a supplement to more extensive training.

#### 9. Visual Aids

Visual aids can not be underestimated as a tool

(1) Steinmetz, Cloyd S., "Selection and Development of Foremen", American Management Association, Production Series, Bulletin #174, 1947



in the training process. Although not a complete procedure in themselves, they are invaluable as a training aid, and are used today more than ever in training programs of all types.

Technically, the blackboard can be classified as a visual aid and is indispensable in the lecture and the conference. It is low in cost and is most flexible for many uses.

The use of motion pictures may be more advantageous than the actual observation of an operation. Attention can be focused as desired and speed can be regulated. Many companies produce their own films and slides which can be designed to cover specific problems.

Increasing use is being made of the stereoscope in present day industry. This aid is a projector which will reproduce almost any object, picture, or chart that will fit into the projection aperture. Related to the stereoscope is the lantern slide where actual slides may be interspersed with typewritten messages or drawings.

Visual aids can be used for the following purposes: to introduce a subject; to provide a general or detailed view of an entire operation; to present facts and ideas; to emphasize important points; to enlarge the scope of a subject beyond units included in training; and for general propaganda purposes. They must be supplemented by additional instruction methods in order to be most effective.



#### D. Follow-up Methods

There are various means of following up training --some specific and tangible, others not so tangible. Although the necessity of adequate follow-up is apparent, the weakest part of most company programs is the failure to attempt any such activity at all. In other words, ideas which are generated in the training sessions may not be translated into action; without action, the cost, effort, and time put into the training are utterly wasted.

##### 1. Review and Summarization

Review is used either during the training program or immediately at its completion. Its purpose is to relate previous discussions to the subject at hand. Written reviews and examinations are generally frowned upon since they tend to formalize training procedures to too great an extent. A canvass of suggestions have been found valuable as both a review and as a guide for future procedure.

##### 2. Notes on Training Sessions

Some companies have found it advantageous to take stenographic minutes which are mimeographed and distributed. In many cases, they are bound together at the completion of the course and serve as manuals for the guidance of the supervisors. These are available as an objective record of accomplishment. Prepared summaries may be preferable to complete transcripts since they are easier to follow and contain only pertinent data.



### 3. Supplementary Reading

By this is meant reprints by the company of articles relating to the subject matter at hand. It is generally agreed that the group should not be overburdened with these, and that they will not be successful unless time is taken to relate the material to the discussion and to arouse sufficient interest.

### 4. Company Magazines and Bulletins

Company publications can be utilized for the purpose of reprinting summaries of lectures, conferences, or material selected from outside sources. This medium can also be used as a channel of communication from top management to the supervisors on any subject of interest. Aside from being able to dramatize and serve as a record of subjects discussed, these can also be used to advertise the series and the advantages to be obtained therefrom as well as serving as a basis for general communication to the supervisor. Almost every company of fair size maintains some periodical of this sort. (1)

### 5. Personal Instructor-Trainee Contact

The instructor cannot divorce himself of respon-

(1) Some typical company publications put out for this purpose are: "Management Notes" (Armstrong Cork Co.), "Supervisor News" (Detroit Edison Co.), "Bulletin for Management" (Bell Telephone Co. of Pennsylvania), and "The Supervisor's Bulletin" (Minnesota Mining and Manufacturing Co.).



sibility for follow-up. He can do an invaluable service by observation and perhaps interview. By means of such contact, the instructor may be able to provide coaching for assistance with special problems. He can also view the success of his training by viewing the application of his instruction to on-the-job problems. The trainer should always be prepared for and be acquiescent to calls for aid from his former trainees. His job with any group is actually never completed.

#### 6. Observation Visits

Observation is an invaluable follow-up to conferences and lectures. It provides for concrete illustration of problems previously discussed, such as interdepartmental relations, job methods, and plant layout. Observation need not be restricted to the particular plant of which the parties are members, but can also be extended to outside plants where the trainee can broaden his views--an essential aspect of supervision.

#### E. Training Details

##### 1. Company's Time vs. Trainee's Time

Most companies agree that training should be done on the company's time. There are, however, two points of view about this problem. Those who favor company time for training maintain that if training is to be considered a management tool for increasing efficiency and as a device



for improving efficiency and proficiency of the supervisor on the job, it should be paid for by the company. If, however, the training is considered a tool of the employee as a means of advancement in position or salary, it should be done on his own time.

Needless to repeat, most favor the first view. Any training program providing for the use of company time should furnish arrangements for reliefs to free the supervisor for training whenever necessary.

### 2. Frequency and Length of Time of Sessions

The average frequency of sessions established by most companies is one week intervals or less. Longer intervals usually make for discontinuity and disinterest. Provision should be made in advance for the exact days and hours (as well as the number) of the meetings and these must remain as fixed as possible throughout the training period.

Each session should be long enough to allow time for leisurely canvassing of opinion and summarization in the case of the conference, or for a full treatment of the topics in other training methods. The optimum conference time has been found to be from one and-a-half to two hours; while a lecture should rarely last longer than forty-five or fifty minutes.

### 3. Place of Meeting

The place of meeting is an important factor--especially so when conferences and discussions are utilized. It is imperative that distractions be kept at a minimum,



and that the conference room be quiet, comfortable, informal, accessible, and available when needed.

In smaller firms, it is often possible to arrange the meeting in a place outside the plant if a suitable place cannot be obtained within plant facilities.

The desirability for a "sitting around the table" atmosphere cannot be overstressed. To be strictly avoided are the dire effects caused by formality and the "classroom".

#### 4. Size of Group

The size of any training group must be adjusted to the requirements of the training method used. Most companies agree that from twelve to twenty is ideal for the conference. Less than twelve will cause difficulty in getting the diversity of opinion needed to generate interest. Over twenty conferees would make individual participation unwieldy.

There are no such restrictions on the size of a lecture audience group. This will depend upon the convenience of the firm and of the abilities of the lecturer. If the lecture-conference is used, however, than a large lecture group may be sub-divided into smaller numbers for the conference.



#### F. The Training-Within-Industry Program

The Training-Within-Industry (T.W.I.) program of World War II has produced sets of training principles which now hold a high place in all of industry. The program was a product of the War Manpower Commission and was an emergency service to the nation's war contractors and essential services. T.W.I. was the most effective training aid developed to meet industry's gigantic job of converting new untrained workers into trained personnel in the shortest possible time. (1)

The program is best known for its results: Job Instruction Training (J.I.T.), Job Methods Training (J.M.T.), Job Relations Training (J.R.T.), and Program Development Training (P.D.T.). These have since become accepted tools of management.

The fundamental principle involved is the "multiplier principle" whereby a standard method is developed; prospective trainers were instructed who then taught other people who in turn trained repeated groups of workers to use the method. As the Report puts it:

4 National Directors, who have trained 10 Field Representatives, who have trained 200 Institute Conductors, who have trained 12,000 Trainers, who have trained 1,000,000 Supervisors who (will) direct the work of 10,000,000 War Production Workers. (2)

(1) War Manpower Commission, The Training-Within-Industry Report 1940-1945, 1945

(1) Ibid.



T.W.I. was meant to train three areas of management: a) top management--in what training is, what it can do for the plant; b) line executives and supervisors--in the use of the supervisory problem-solving methods; and c) staff men with functional responsibility for planning of training--in the use of a method for solving production problems through training.

#### 1. Essentials for Defense Industry Training

Essentials for training programs for defense industry were set up by T.W.I.:

- a) The training program should be one of utter simplicity.
- b) It must be prepared for presentation by intensive and carefully "blueprinted" procedure, utilizing a minimum of time.
- c) It must be built on the principle of demonstration and practice of "learning by doing" rather than on theory.
- d) The program should provide for "multipliers" to spread the training by coaching selected men as trainers who...go into industry and in a uniform manner pass the program on to supervisors and their assistants who would use it in training workers. (1)

The "five needs" of the supervisor concept was also evolved:

- a) Knowledge of Work - materials, tools, processes, operations, products and how they are made and used.
- b) Knowledge of Responsibilities - policies, agree-

(1) ibid.



ments, rules, regulations, schedules, interdepartmental relationships.

c) Skill in Instructing - increasing production by helping supervisors to develop a well-trained work force which will get into production quicker; have less scrap, rework and rejects, fewer accidents, and less tool and equipment damage.

d) Skills in Improving Methods - utilizing materials, machines, and manpower more effectively by having supervisors study each operation in order to eliminate, combine, rearrange, and simplify details of the job.

e) Skills in Leading - increasing production by helping supervisors to improve their understanding of individuals, their ability to size up situations, and their ways of working with people. (1)

The three programs affecting supervisors (J.I.T., J.M.T., and J.R.T.) were designed to be taught in three ten-hour programs, each in five two-hour sessions. The outlines of each program were reproduced on small pocket cards for repeated reference. These outlines are reprinted in Appendix A.

#### G. Training of College Graduates

More and more, industrial organizations are looking to colleges and universities for graduates who can be placed in special training courses in preparation for positions of junior and executive responsibilities. As early as 1925, one university reported that it was approached by eighty-five different organizations seeking to employ its graduates.

(1) ibid.



In 1948, the National Industrial Conference Board published a study of college graduates in industry as a result of a survey made of one hundred and forty-two companies. The charts reproduced (in some cases condensed) below are taken from that survey, with modifications as noted. (1)

#### 1. Duration of Training

The programs of the companies studied varied from seven weeks to five years in length; the average time was twelve to eighteen months. It is conceded that such training is a long-term investment in personnel, but it must be realized that not training may be much more expensive to the company.

There is a close relation between the training time and the objectives of the training. Some jobs, of course, require more training than others.

Figure 6 - Duration of Training Programs for College Recruits

<u>TRAINING PERIOD</u>	<u>Number</u>	<u>Percent</u>
Less than 27 Weeks	10	7
27-51 Weeks	29	20
One Year	29	20
Over One Year	65	47
TOTAL	142	100

#### 2. On-the-Job versus Classroom Training

Direct on-the-job training seems to be much pre-

(1) National Industrial Conference Board, Studies in Personnel Policy, #89, "College Graduates in Industry", 1948



ferred over straight classroom instruction. This may be primarily observational or may involve direct participation. It is expected that the trainee will learn about machines and procedures and come to understand the part they play in the total picture. One manufacturing concern executive summarizes the thinking of many others on the chief objectives of a training program as follows:

The main thought in our training program is to teach the trainee what the functions of the departments are, what the relationships between the departments are, and how the various jobs are done. The time allotted to each department is supposedly sufficient only for this much training. We do not in general attempt to make a skilled workman or technician of the trainee on any single job through this training period. However, in order to learn the various functions and relationships it is necessary for the trainee to do the actual work. Only in rare instances do we use the trainee as an observer. He is shown how to do a job and then expected to do as good a job as he can. In general he will be transferred to another department before he has acquired more than a rudimentary skill. (1)

This feeling can be seen in the N.I.C.B. chart below where ninety percent of the company programs use on-the-job training for over half of their content, whereas only five percent use classroom training for same extent.

(1) ibid., p.18



Figure 7 - On-the-Job versus Classroom Training\*

Percent of Time Spent	On-the-Job		Classroom	
	No.	Percent	No.	Percent
Over 50%	127	90	7	5
Under 50% (or none)	2	1	132	93
Not Reported	13	9	3	2
TOTAL	142	100	142	100

\*Combined and condensed from two separate tables in the N.I.C.B. survey.

### 3. Use of Written Reports

The requirement of written reports from the trainee is prevalent in a large majority of the companies studied. Although these reports are primarily for the trainee's benefit, many firms have found suggestions and findings in the reports of real value to them.

Figure 8 - Written Reports for Trainees

<u>Company Practice</u>	<u>Number</u>	<u>Percent</u>
Reports Required	107	76
Reports Not Required	33	23
Not Reported	2	1
TOTAL	142	100

### 4. Special Training Methods

Some special training methods found effective by companies include the following:

- a) Include trainees in all meetings of foremen.
- b) Use visual aids freely.
- c) Have reports made orally before the group to develop public speaking ability, to get criticisms of others, etc.
- d) Construct a small-scale model of the plant (de-



partment, etc.) to help with orientation, to show flow of production, etc.

e) Assign real projects for study. Do not repeat standard assignments year after year.

f) Keep the training schedule flexible and be willing to make adjustments.

g) Use the "preceptor method" on the job, assigning each trainee to a company worker for the individualized "coaching" type of instruction. (1)

## 5. Ultimate Placement

Naturally, the companies tend to place graduates in the positions for which they are trained. The trend of placement of the programs studied is shown below:

Figure 9 - Placement Positions

<u>Positions</u>	<u>Number</u>	<u>Percent</u>
Administrative Assistants	38	18
Assistant Supervisors	51	23
Technical Positions	72	33
Sales	50	23
Others (General, Research, etc.)	7	3
TOTAL	218	100

As an interesting sidelight to the above, the approximate salaries received by the trainees (1947) is also tabulated. The general average of the 142 companies for salaries paid at the start of training was \$235. At the beginning of the second year of employment with the company, the salary average jumped to \$275.



## V. The Conference Method

### A. Introductory Statement

The primary principle of the conference is the development of ideas and solutions to problems through the contributions of each member of the group.

An informal conference concentrates on a group discussion of experience and opinions which are stimulated by the instructor. This gives an opportunity for the expression of different points of view and develops logical thinking. Stemming from the above are better absorption and sustained interest.

In what is sometimes called "determinate" discussion, the leader carefully directs the discussion into specific channels. In addition to the advantages cited for the informal conference, this additional technique can also cover more ground with less side-tracking.

Any conference procedure runs the risk of poor leadership. It is imperative that the chosen leader be thoroughly trained as to guiding the discussion, preparing outlines, and keeping on the subject in order that the conference may reach the desired goal.

The "modified" conference is a term used to apply to another aspect of conference procedure, whereby established company policy and principles applicable to the situation under discussion are given to the group beforehand. The group then applies these to the solution of the problem.



This added procedure brings advantages which are important to the process:

- a) It automatically draws upper supervision into the program by requiring it to help prepare and approve material to be passed on to trainees.
- b) It provides a greater assurance of the development of uniformity of managerial opinion and of its application.
- c) It saves time in developing an acceptance of fundamental principles of management which cannot be changed regardless of time spent in developmental discussion.
- d) It provides an organized medium through which solutions to problems can be uniformly considered and by which management can secure uniform understanding of new policies, plans, procedures, etc. on which uniformity is essential. (1)

All of these various modifications of the basic conference method can be combined for ideal performance. The following discussion presumes a directed conference with the leader's close guidance toward the reaching of desired objectives.

#### B. Planning for the Conference

##### 1. Preliminary Physical Arrangements

The conference can be best accomplished with a horseshoe shaped arrangement with the leader at the open end. In this manner, each conferee can see all the others, thus greatly facilitating discussion. Most companies also make use of tables for writing and keeping papers.

(1) Dodd, Alvin E. and Rice, James O. (Eds.), op. cit.



In addition, the proper accouterments should be in place: blackboard and chalk (if used), pencils, paper, and ash trays. Of course, the lighting, temperature, and ventilation must be given due consideration. Interruptions should and can be avoided, as well as unnecessary noise which can be eliminated.

## 2. Size and Composition of the Group

The ideal conference group contains somewhere between twelve and twenty participants. As it increases beyond that point, the leader's problem of guiding and controlling becomes increasingly difficult. For instance, in a group of fifteen where each person takes up an average of two minutes for discussion, that is a total of thirty minutes. In a group of twice that size--or thirty--sixty minutes are required. Taking the leader's part into consideration, it can readily be seen how sizable groups can become cumbersome.

As for the composition of the group, there are at least two alternatives: one encompassing various levels of supervision, or a group where conferees are all of the same level. In the former, it is usually found that there is a tendency for those of the lower levels to keep quiet or to assume the position of "yes men". Therefore, a homogenous group is usually preferred. However, there is an advantage to the heterogenous composition; the airing of mutual problems lead to a greater appreciation of various



levels by all concerned.

The length of the conference is difficult to arbitrarily determine. We can safely say, though, that any time limit of under one hour brings a tendency to just touch on important points in a "one-over-lightly" manner and to railroad opinions due to the time limitations. Meetings lasting over two hours tend to drag and the leader cannot easily maintain group interest.

The time limits, therefore, are entirely subject to the nature of the topic, interest of the group, and the effectiveness of the leader's planning and preparation. An important factor is to set the time in advance of the meetings after careful consideration of all the aspects involved, and then to conscientiously stick to this arrangement.

### C. Organization of Conference Material

#### 1. Purposes of the Conference

To look at the conference in its proper perspective, it can be viewed from three vantage points as to purposes involved. Training is only one aspect of the broad conference technique. Conferences can also be used for discussion of current operating problems and for the discussion of current operating policy or related administrative procedure.

Since we are primarily interested in the training aspect, there we will concentrate these remarks.



## 2. Choosing a Topic and Selecting Appropriate Phases

Choosing a topic should not be difficult if the training program is filling a known need within the organization. Usually, the topic has roots in some everyday problems of the business, but it may also be geared toward the long-range betterment of supervisors in general. Naturally, the topic will be ineffective if it is not within the experience or knowledge of all members of the group.

There are many considerations which should be viewed in selecting appropriate phases for discussion. For instance: what does the group expect to get out of the sessions? what most concerns conferees at the time of the conferences? how much previous experience has the group had in relation to the proposed topic? what can the group accomplish by discussion?

Usually, sub-topics should be phrased in the form of a direct question to the group in order to stimulate interest and thinking, and to more precisely indicate the nature of the topic.

## 3. Developing the Leader's Outline

The leader's outline is indispensable and one of the most important tools of the training conference. It causes the leader to think through the topic in all its details. The outline is also an invaluable aid in keeping the discussion "on the beam" and as a source of ideas for stimulating discussion.



Of course, the leader must be pliable enough to deviate from his outline when necessary. It should not freeze the over-all purpose of the conference.

All outlines should contain three essential elements: a statement of objectives with a digest of introductory remarks, including the nature of the topic, general problems involved, and the scope of the discussion; a development of discussion where aspects of the problem are searched out on which there are pro's and con's; and a digest of concluding remarks which can include a summarization and crystallization of the discussion, tying in an introduction to the next session.

Figure 10 gives an idea of a conference outline in condensed form.

It is often necessary for the leader to provide additional informational material to fill gaps. Necessarily, only well-substantiated information should be given and opinions kept at a minimum. If the subject is controversial, the leader should bring differing viewpoints to the group rather than only one.



### Figure 10 - Discussion Outline\*

SUBJECT: Supervisory Leadership

OBJECTIVES:

- 1- to analyze a specific problem in supervisory leadership concerning on-the-job relationships between a foreman and his subordinates
- 2- to discuss the factors a foreman should consider before making a decision on how to act in situations of this type
- 3- to draw out of the discussion a general principle of supervisory leadership that should govern a foreman's conduct in this instance and in other similar activities.

INTRODUCTORY REMARKS:

- 1- Leadership in business is the art of getting people to work together harmoniously toward the fulfillment of the objectives of the enterprise.
- 2- Leadership qualities can be developed and strengthened by a careful analysis of fundamentals and their consistent application.
- 3- A good way to consider factors involved in supervisory leadership is to examine critically actual case situations.

DISCUSSION DEVELOPMENT:

- 1- Have group read case problem:  
(A specific case is presented)
- 2- Ask for opinions as to whether supervisor in case did the correct thing and for reasons to substantiate opinions.
- 3- After normal responses and cross-discussion, point up the discussion toward conclusion.
- 4- State other types of situations which may arise in the same vein.
- 5- Again ask for opinions with substantiations.
- 6- Point up this discussion also toward a conclusion.

CONCLUSION:

- 1- Review leadership factors involved in the problem and alternative methods for handling the situation.
- 2- Summarize the position which the majority favor and emphasize the leadership factors involved.

\* Adapted from "Techniques of Conference Leadership", National Industrial Conference Board, Studies in Personnel Policy, #77, 1946, p.30



#### D. Effective Conference Technique

##### 1. Preliminary Steps

Before actually getting the group started, the leader will do well to review his outline thoroughly. It should not be necessary to constantly refer to notes; an aura of spontaneity about the conference will cause much more satisfactory results.

At the start of the session, it is most important that all formality be avoided which could be reflected by the group. Promptness is also essential.

To put the group at ease at the commencement of a series of sessions, the leader should make sure that all conferees are acquainted with one another. This should not be overdone; the group will more readily respond to attitude than to obvious devices for creating proper atmosphere.

##### 2. Use of Questions

The opening question to the group can be the keystone to a successful conference. Ordinarily, "yes" or "no" questions will not be so effective as ones which require thought and explanation. Questions can be used for guiding as well as initiating discussion. Guiding questions can be appropriately formulated after awaiting responses and cross discussions; they cannot be prepared.

There are four main classifications of questions:

- a) Directed question: The leader addresses his question to a specific person; it should be avoided unless



specialized information or clarification is desired.

b) Overhead question to group: The leader directs the question to the group as a whole; this is to stimulate further discussion around a desired topic.

c) Reverse question: When a group member asks a question of the leader, he can redirect it back to the questioner--especially if the latter seems to have an unexpressed opinion on the subject.

d) Relay question: In this situation, a question directed to the leader is thrown back to another group member. Discussion can thus be further stimulated, or else the question may be used to relate to previous discussion.

Of course, the leader sometimes answers a question, also. He may do so justifiably if the subject has been fully explored and his opinion is asked. However, the leader should not allow himself to indulge in debate over any of the subject matter.

Figure 11 gives a clearer picture of these uses of the question by the leader.

### 3. Charting

The technique of charting is used almost invariably with the training conference. It consists of a record of significant points compiled as the discussion proceeds. Charting is usually done on a blackboard as this affords the best opportunity for the conferees to view the notations.



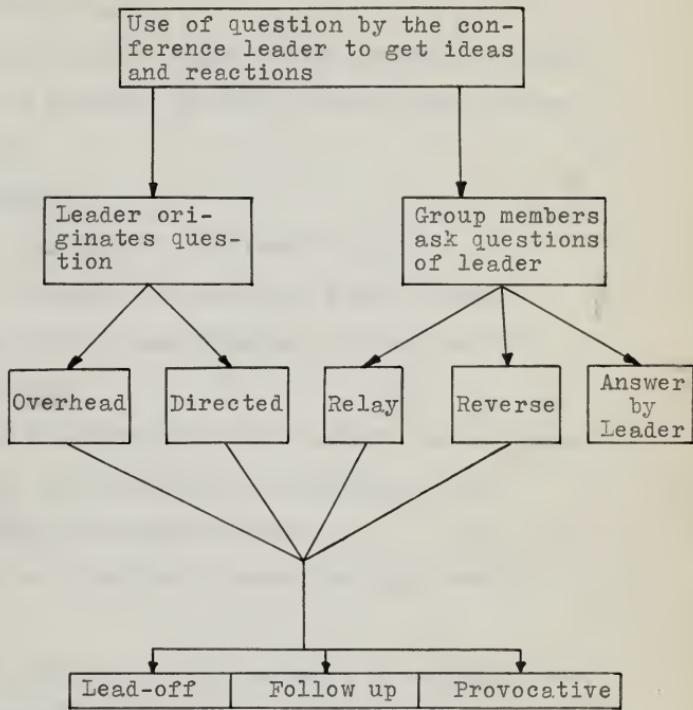
Figure 11 - Flow Diagram of the Uses of the Question\*

PROBLEM

HOW QUESTIONS  
ORIGINATE

TYPES OF QUES-  
TIONS USED

WAYS IN WHICH THE  
FOUR TYPES OF  
QUESTIONS MAY BE  
USED



\* Hannaford, Earle S., Conference Leadership in Business and Industry, McGraw-Hill Book Co., Inc., N.Y., 1945, p. 110



Advantages of charting are manifold. Beckman provides a very complete listing which shows the extreme value of this conference aid:

a) it is a visual aid of value in the learning process  
b) attention is centered on the specific aspect under discussion

c) prevents repetition  
d) avoids sidetracks into unrelated topics  
e) stimulates interest and promotes flow of ideas  
f) members tend to be more precise in their use of words

g) can provide a permanent summary record (if on paper)  
h) helps leader in summarizing, concluding, etc.  
i) provides sense of accomplishment  
j) can be used as a review if retained from session to session

k) can provide the leader with a means of self-evaluation or accomplishment (1)

Charting can summarize a volume of words into a short, concise listing. It saves time, clarifies, interprets, and directs. If the leader does his own charting, he can provide himself with an excellent means of directing the attention of the group.

(1) Beckman, R.O., op. cit., pp. 50-58



#### E. Evaluation of the Leader's Performance

Figures 12 and 13 show two ways in which the leader's job can be and is evaluated. In the first of the two (filled out objectively by a rater), total scores are relatively insignificant unless comparisons are being made of two or more leaders. Even then, variations of less than ten points do not mean too much since the weights are arbitrarily assigned. There is no questioning the fact that a detailed analysis of each item is far more significant than an aggregate score. The leader should receive a copy of the evaluation report and attempt to check himself where he was graded low in any particular point.

The second type of scale (Figure 13) is a subjective measurement of the conferees' attitudes toward the conference and is given at the close of the course sessions. Conferees do not sign their names to the paper, but this does not hinder a realistic rating of the value of the conferences and of the leaders. Although subjective, much benefit can be derived from this technique.



Figure 12 - Evaluation of Leader's Performance\*

Discussion led by \_\_\_\_\_ Date \_\_\_\_\_

Topic \_\_\_\_\_

	<u>WEIGHT</u>
1. Inadequate introduction to topic; group did not absorb	____ (-3)
2. Lecture type of introduction	____ (-1)
3. Failure to arouse and/or sustain lively interest	____ (-4)
4. Failed to establish and clarify purpose of successive charts	____ (-3)
5. Topic title not displayed	____ (-1)
6. Did not secure understanding of important terms.	____ (-1)
7. Leader nervous, ill-at-ease	____ (-2)
8. Referred too much to notes	____ (-1)
9. Unprepared	____ (-4)
10. Too few members participated	____ (-3)
11. Side-Tracking not energetically checked	____ (-3)
12. Lack of attention; side discussions	____ (-2)
13. Permitted too much wrangling over words	____ (-2)
14. Discussion monopolized by a few members	____ (-2)
15. Too many lags in tempo	____ (-2)
16. Leader lacked enthusiasm	____ (-2)
17. Shortage of pertinent case material	____ (-4)
18. Failed to analyze and clarify	____ (-3)
19. Abrupt or tactless	____ (-1)
20. Leader too verbose	____ (-1)
21. Poor distribution of time	____ (-2)
22. Failed to draw conclusions and "drive them home" in closing	____ (-2)

\* Condensed from: Beckman, R.O., How To Train Supervisors, Harper & Bros., N.Y., 1942, pp. 82-83



Figure 13 - Attitudes Toward Training Discussions\*

In answering the following questions, place a check mark (✓) on the line opposite the answer which most nearly represents your frank opinion or belief. DO NOT SIGN YOUR NAME!

1. How do you feel about these discussions?  
 a. Time well spent, of definite benefit to me  
 b. They were useful  
 c. Doubtful as to their value  
 d. Time completely wasted
  
2. Would you have attended if you had not been requested to do so by your supervisor?  
Yes  No
  
3. What do you think of your discussion leader?  
 a. Entirely satisfied  
 b. He seemed all right; but I did not warm up to him  
 c. Did not care for him; would have preferred another
  
4. Which topics did you enjoy? (List)  

---

---
  
5. From which topics did you get the least benefit? (List)  

---

---
  
6. What specific topics not discussed would you like to have discussed? (List)  

---

---
  
7. In what respects have you changed your attitude in handling your men as a result of these discussions?  
 a. have gotten better acquainted with the men  
 b. no change in attitude  
 c. have done a better and more careful job of instructing men  
 d. succeed better in placing right men on right job  
 e. have been able to cut down time losses  
 f. spend more time and thought on planning  
 g. have been able to improve labor relations  
 h. have been less hasty in making decisions  
 i. get and give better cooperation  
 j. have improved my manner of giving orders  
 k. (write others)  

---



Figure 13 - (Continued)

8. The discussions have helped me to understand:
- a. the shortcomings of my supervisors
  - b. the faults of my workers
  - c. the defects of other supervisors
  - d. my own shortcomings

9. Do you feel better qualified in handling men?  
Yes  No

10. What are your suggestions to improve meetings of this kind?
- 
- 

11. If absent during the series, indicate why
- a. Could not leave the job unprotected
  - b. Illness
  - c. Lack of interest
  - d. Other reason \_\_\_\_\_

\* Adapted from: Shellow, Sadie M. and Harmon, Glenn R., Conference Manual for Training Foremen, Harper & Bros., 1935, pp. 160-162



#### F. Qualifications of the Discussion Leader

This chapter, while ostensibly concerning the conference itself, actually has centered about the conference leader. It is the leader who makes the conference technique a success--or, of course, a failure. It is his responsibility to make preliminary plans and arrangements; to set up a framework providing an opportunity for consideration of all the various phases of the topic; to initiate, direct, and control the discussion; to assist the group in reaching conclusions; and to formulate plans (if necessary) to implement the conclusions of the group.

He must, therefore, be an individual of more than ordinary abilities. What are these qualifications which the conference leader should possess in order to meet his job requirements to the fullest extent?

First of all, he should be adaptable and intelligent; whereas a high school education is a must, it is preferable that he have college training in business administration, personnel, teaching, and the like. The best leader thinks in concrete rather than in general terms, and has a practical rather than academic attitude of mind.

To be more specific, the following characteristics are indispensable to the leader:

- a) high ethical standards; integrity and open-mindedness
- b) teacher as distinguished from instructor; the ability to influence others in attitude and orderly thinking.



- c) leadership ability; a consistent tendency to occupy the foreground of any activity with which he is associated
- d) maturity in thought and experience which will be recognized by the members of his conference group
- e) a pleasing and ingratiating demeanor as to his personal appearance and manners; earnestness and enthusiasm in his relationships with others
- f) experience in and knowledge of the fundamentals of supervision acquired through association with working groups
- g) thorough acquaintance with the purposes, organization, and operation of the company and the working conditions of the employees

The entire conference technique is a lost cause unless the proper leaders be obtained--preferably from within the organization. Special programs have been set up to train conference leaders (e.g.: the government T.W.I. program), and some of these are extremely successful in assuring that the right man is properly oriented in conference leadership.



## VI. Representative Programs

### A. General Electric Company

#### 1. Foreman Training Conference

Based on previous experience of the lecture method and interdepartmental visits, General Electric ran a series of foreman's conferences for every supervisor in the plant. In the initial formulation of the program, certain fundamental principles were established:

- a) Foremen deal with specific situations. Therefore discussion must be led from specific matters to general policies and principles.
- b) Company policy is developed from the experiences of daily operations and represents the combined best judgment of all who participate in management.
- c) Since Foremen are operating men, all grades of supervision from the foreman to the manager must be familiar with the program.

The program was under the general direction of a member of the Manager's staff who developed conference plans for each subject at weekly meeting with conference leaders and a steering committee of section superintendents with direct interest in the subject. Each conference group included representatives from as many departments as possible to obtain a cross-section of plant supervision. Meetings were arranged once a week on company time for a two-hour conference session.

Securing effective leadership was one of the first problems encountered. Fifteen men were selected as leaders on the basis of leadership qualifications and ability to



master the conference technique. These men had diversified backgrounds and held positions of varying responsibilities. Before they met with their groups, the leaders were given twenty to thirty hours of instruction and practice in conference leadership technique. Emphasis was placed on the ability to keep a subject in hand under all circumstances.

In the actual conference, one of the group was elected to act as secretary and take notes on the group's conclusions. At the end of the meeting, the secretary read his notes aloud to insure that all conclusions reached had been correctly recorded. Not only was a copy sent to each member; but subsequently, a consolidated summary of all the conference minutes was likewise dispatched to the group. No comment or criticism was permitted to pass outside of the conference room.

At the first conference, the question was asked: "What is the foreman's job?" From the answers were evolved the entire list of conference topics, arranged in order of preference. The first fifteen were:

- a) Building the Working Force
- b) Reducing the Working Force
- c) Assigning and Instructing Men
- d) How to Handle Grievances
- e) Safety and Housekeeping
- f) Job Evaluation
- g) Wage Rates
- h) Rating Men



- i) Company Benefit Plans
- j) Production Control
- k) Maintenance of Facilities
- l) Elimination of Waste and Spoilage
- m) Costs and Accounting
- n) Expense Budgets and Cost Reduction

There was nothing rigid about this list. When necessary, more than one session was devoted to a topic, or others were added depending upon the current interests of the men.

This program at General Electric has developed a marked improvement in foreman-subordinate relationships, and also in cooperation between and among foremen.

## 2. College Graduate Training

In 1948, General Electric hired more than 1400 graduates of 150 colleges. This record number was prompted by the company expansion policy and as a result of the wartime shortage of graduates. A good number of these men have entered the company's intensive training program.

The basic course, the General Electric Company's Student Engineer's Training Course (or Test Course) is based upon the assumption that even though an engineering or business background is best obtained in technical colleges, there are essential practical viewpoints which can best be gained while the student is actually employed in various divisions of the company. Therefore, the application of



the Test Course is not limited to those who have had only electrical engineering.

Usually from twelve to fifteen months are spent in this department. All major departments offer post-graduate training during this period. In all sections of the course, students are graded by their supervisor according to performance, ability to assume responsibility and get along with people, and other important qualities. The company maintains recreational facilities for the Test men, and they are encouraged to join the various social clubs open to them.

The General Course, open to all Test men consists of the Business section and four Engineering sections: Electrical, Mechanical, Electronics, and Engineering Fundamentals. The company also manages Sales Engineering and Design Engineering programs for selected Test men.

A separate entity is the Business Training program designed to provide training in accounting and business administration. The trainees are put on jobs in the various departments of the Apparatus Department; and, in addition, on jobs in the General Accounting divisions where they are able to observe financial operations in all operating and general administrative departments, and affiliated manufacturing, selling, and financial companies. This program lasts approximately three years and is supplemented by evening courses in accounting and business subjects.



### 3. Analysis

The principles under which the foreman training conference was formulated (1) is sound according to the basic fundamentals laid down in the course of this essay. The second principle, stating that company policy is developed from daily operations and combined management judgment, is especially important. In this case, the company recognizes that company policy is not something to be dictated from the top echelons. All of management must participate in order to assure policy of satisfactory nature.

Another fundamental principle was the truism that all grades of supervision must be familiar with the program. Certainly this is solid ground on which a program can be administered. We have already noted that foremen and supervisors will accept a program more readily if they have a proper portion of participation in its planning and guidance. This goes for all management. It naturally follows that once the program is fully formulated, it should not be kept a secret, but it should be completely disseminated through all of management.

The first principle, cited on page 87, could bear further scrutiny. To repeat it as set forth by the company: "Foremen deal with specific situations. Therefore discussions must be led from specific matters to general policies and

(1) See page 87



principles."

This paper has stated that the training of foremen must be conducted on as practical a level as possible. It is all very well to lead discussions from specific matters to general policies and principles. However, this general discussion must relate back again to the specific problems which face a foreman. In Chapter II, it was asserted that learning is a direct function of its consequences and that what is learned must be practicable. If theoretical material is not directly related to actual situations, the continuity factor will be lost from the learning picture.

General Electric did well to recognize the importance of securing and training effective conference leadership. Prospective leaders were chosen on the basis of apparent conference leader abilities and qualifications (closely akin to those set forth in the chapter on the conference technique). These men were then given intensive training on conference procedure. The time and expense given to this phase of securing effective leadership has been a fundamental factor in assuring successful conferences in the actual supervisor training.

The development of conference topics shows an understanding of the position of the trainee foreman on the part of the company. The men themselves chose the subjects in which they were interested. It is often useless to tell



trainees in what fields they should have problems. If a representative group is given the opportunity to select pertinent topics, a valid conference list can be formulated --as seen in this case of General Electric.

Of course, the above must be considered in a practical light. There should be guidance in topic selection, and some subjects have to be added when seen necessary. However, the desirability of decisions being made by a concerted effort of all concerned (as opposed to being handed down from above) cannot be denied.

General Electric's college graduate training is based on solid foundation in that it recognized that practical viewpoints can best be obtained in actual work in various departments of the company. However, it is also admitted that a technical background is best gained in technical colleges and universities. In other words, General Electric hires a man who already has an appropriate background and then trains him to put his theory into actual company practice where he is best suited. This is consistent with a policy of hiring good men and training them with a minimum of time and expense. Even with this procedure in operation, the Test training lasts from twelve to fifteen months--even for a man whose education has been highly specialized in the electrical field.



### B. Ford Motor Company

The inauguration of Ford's new Management Development Program took place in January of this year. It includes present members of management as well as qualified hourly and salaried employees.

The objectives of the new program are:

- a) to train all present members of management in the specific duties of being a manager
- b) to select qualified employees for promotion as trainee members of management responsibilities and handle their job assignments with a maximum of effectiveness.

Over two years of study and preparation is represented by the plan which is a joint activity of Manufacturing and Industrial Relations. The Training department has the responsibility for the preparation of all training materials for the program of organized instruction throughout the company.

#### 1. Present Supervision

The program for improving the job performance of present supervisors is divided into the basic phase, the group performance phase, and the individual performance phase.

The first phase (basic) provides the supervisor with a thorough understanding of:

- a) the Foremen's Compensation Plan which establishes the duties and responsibilities of all levels of supervision



- b) assignment of job responsibilities
- c) plant organization
- d) his responsibilities as the manager of his department
- e) available staff services
- f) principles of line and staff organization

The group performance phase is designed to enable the supervisors to perform all the functions established by the abovementioned Foremen's Compensation Plan. Observations are made periodically to determine if supervisors are performing these functions and to check the effectiveness of the training program.

By means of the individual performance phase, the supervisor is assured that he is performing all of his assigned functions in a satisfactory manner on the basis of a progress rating plan. Deficiencies are corrected through personal instruction or in organized training sessions.

## 2. Trainee Foremen

Organized training in how to effectively perform the Foreman's job is provided for these trainees in a series of about one hundred one-hour sessions covering management responsibilities and knowledge of tools, machines, equipment, and materials. (1) The trainee foreman attends ses-

(1) Thirty hours are devoted to personnel; five hours to quality; ten hours to cost; fifteen hours to production; ten hours to use of staff services; ten hours to company development; and twenty hours to tools, machines, equipment, and materials.



sions for two hours on each of two days per week for a twenty-five week period on his own time.

Both shop and related progress records are kept which are considered in evaluation of progress. Unsatisfactory performance disqualifies the trainee for consideration for promotion to a supervisory position.

#### 3. Plant Procedure

Each plant makes a factual analysis of supervisory performance and reports its training needs to the central committee at Dearborn. The Training department consults other staff departments and develops necessary training material, which must be approved by the Dearborn committee before going to the plant manager for review by his staff. Material is then adapted to fit local conditions and the plant group provides the necessary training.

#### 4. Analysis

Ford's inauguration of this new management training program is highly significant. It is representative of the entire future policy of the Ford Motor Company with respect to the selection of supervision at all Ford operations.

First, it means that the program will provide the only channel through which an individual can become a foreman. Second, the future executives of the company will be selected from the ranks of present supervisors. Third, the program means that every man's progress in his management



development depends upon his own initiative and ability--"upon what he knows and not whom he knows".

The Training department will have the responsibility for the preparation of all training materials for the program of organized instruction throughout the company. In addition, this department will maintain records of attendance, progress and achievement of each trainee, and will provide a composite training record which will become a part of the man's permanent personnel record. This procedure is fully in accord with the general principle that it is the function of the staff Training department to advise and help supervise a program, leaving actual decision making and administration to management operating executives --in this case, the Management Development Committee.

The program for present supervision concurrently provides for two problems:

- a) improving the job performance of supervisors; and
- b) keeping supervisors informed of new company policies, procedures, programs, and so on.

Evidently, the need was seen for an improvement of supervisor performance in the plants. Since the new program is designed to give the supervisor a broader understanding of his job and its relation to all other levels of supervision, management recognizes that the individual must be treated as a part of management and given the tools with which to effectively perform his job. The fact that he will also be kept informed of new policies and procedures



further substantiates this view.

The program for present supervision seems to neglect the highly important human relations angle of the job. Although the management claims that this aspect is given due emphasis in the program, it is questionable whether the emphasis reaches its proper extent in the mind of management. For instance, in the company publication announcing the details of the program there is no mention of present supervision being given any training on this subject. Although human relations doubtlessly is one of the points covered in the training, it is unfortunate that this phase is not given further prominence in the company announcement.

The program for trainee foremen is as important in the selection phase as in the actual training procedures. A basic set of qualifications is set up as minimum requirements for all applicants in the fields of education, experience, work record, physical condition and recommendation. The process of selection is about as foolproof as possible to permit an unbiased objective procedure. Applications are given in to the Personnel department where they are sent to the Selection Committee. The latter reviews personnel files, interviews each applicant according to pre-established standards, and then sets up an eligibility list of applicants who have been approved. This list is referred to Personnel for placement in filling requests for trainee foremen. It is finally sent to the department superintendent



to make the final selection from those referred to him for placement.

This is a very thorough method and should do much toward facilitating a fairly objective process. Collective judgment is used, which should further assure a more consistently correct selection. It might be noted that the selection procedure just summarized follows almost step by step the suggested plan of selection discussed on page 35 of this report. The qualification of maintaining adequate records is also followed by the Ford Selection plan.

The program sets up a file of eligibles which can be used at any time necessary with a minimum of delay. It is, in fact, a "storeroom" of good available supervision material which may be tapped when opening arise. This, in itself, is a most valuable asset to the selection phase of the program.

Again, let us examine more closely the place of the staff Training department in the inter-plant procedure for organized instruction. The individual plant makes a survey of its training needs and reports to the Management Development Committee. At this point, the Training Department formulates the material for the training after consultation with other concerned staff departments. The Dearborn committee must then give approval before being sent to the individual plant managers for review and acceptance. It is seen again that the Training staff assumes a distinctly ad-



visory position with no provisions for any sort of final decision making.

In the main, the new Ford program appears to fill a need at the organization in an adequate manner. From selection to actual training, there seems to be a constant effort to create a good, well-trained management team. If it works out successfully, Ford will have developed an efficient corps of future executives from within the plants with a constant and reliable source of replenishment from the ranks.

##### 5. Comparison

There is a very obvious comparison which can be made between the program of General Electric and that of Ford. In the former, the trainees themselves were given every opportunity to take part in the formulation of the contents of the program. In Ford, however, the exact blueprint was handed down from the extreme top management. The prospective trainees will abide by this program without chance for self-expression on any phase of it. This observation is very characteristic of Ford's entire personnel policy--which may partly account for past failures in this field.



### VII. Summary and Conclusions

The setting up of an organized program is not the only means of training supervisors and prospective supervisors. Supervisory personnel are trained in any number of ways. Undirected training may take the form of absorption or observation where the individual learns incorrect as well as correct supervisory technique.

Therefore, the creation of a formal, planned program of supervisory development is not actually an introduction of training into the organization; but rather a formalization of existing training which eliminates bad training habits.

As ownership and control has become increasingly separated in modern business organization, it has become obvious that industry must produce its top management from within itself. The training of these leaders cannot be left to chance; it must be done by intelligent, effectively planned programs of personnel development.

The management group, from foreman to top executive, has remarkably similar responsibilities. It is imperative that coordination be of the highest sort. These similar responsibilities make it almost essential that the same approach be used in training of all levels of management. Industry has recognized this with the result that an increase in the number of programs set up to coordinate the thinking of all supervisors has been evident. Programs



of this sort serve as an excellent medium for a continuous flow of information through the whole supervisory structure. The only difference in training needs, therefore, is one of extent rather than of kind.

It can be seen, then, that supervisory training procedures are not only designed for their instructional value, but also to provide a management method for the control and direction of effective organization.

At another point in this paper, it was emphasized that there is no one "correct" method of running a supervisor training program. Since no two industrial enterprises are alike, so no two training programs can logically be exactly alike. Each program must solve the specific problems of the individual organization for which it is designed.

If the first step in organizing a program is to clearly set down its objectives and functions, much wasted motion, misunderstanding, and lack of direction can be avoided. This training "definition" serves as a basis of judgment in deciding various questions arising in connection with planning. If the original phrasing of the purpose becomes too broad or too narrow, it should be rephrased so as to accurately reflect the actual program.

By this time, it is fairly well established that no matter how effective a program may be, it will become all the more so with the active participation of top manage-



ment. As demonstrated above, all management has today become a cohesive unit, linked in a direct chain of authority. Any changes in organizational method and policy brought about by a program for the improvement of supervisory skill must be approved by top management. It stands to reason that such changes are worthless unless the giver of final authority understands the background of the thinking which brought these suggestions to his attention. The only way this can be accomplished is through active participation by top management in the personnel development procedure.

Certainly, to say that training needs must be discovered before training begins sounds logical and elementary enough. However, it is surprising how readily a company will undertake a program without bothering to find out what needs will be satisfied by the plan. An effort to determine needs is vital to the success of the program.

As this discussion has repeatedly stressed, the best training method for any particular organization is the one best suited to the needs of that organization. The instituter of the program has available for his use the techniques of individualized instruction, conferences, lectures, case studies, classroom instruction, practice sessions, observation of departments and plant, printed material, rotation, and a variety of other methods and combinations of those mentioned. They can be combined in any number of ways as evidenced in the representative examples surveyed in



Chapter VI--not haphazardly, but specifically designed after a careful study of the organization and its supervisory needs.

Most firms agree that the ultimate decision on training policy and technique should be left with the top executive, with actual operation of the program being left to the line organization concerned. This is not to say that the training director should be blocked from executing his functions by being left in a vacuum. In the case where the head of the organization has final authority, ample provision should be made for frequent conferences between him and the training staff. This procedure is a safeguard against isolating the staff man whose presence in the decision making phases are essential.

The many details of training which invariably come up again can best be left to the discretion of the individual enterprise. However, certain principles can be laid down. The size of the training groups depends upon the method used; lecture audiences are almost unlimited, whereas conference groups are most effective with between fifteen and twenty members. The length of meeting should be at some balance where they are not so long that fatigue set in; more can be accomplished in two two-hour sessions than in one four-hour session. As for the question of "company time or trainee's time", most companies prefer the former where the training is considered insurance for them



and "good business policy". Of course, many production situations make supervisor training on company time extremely difficult.

The training of college graduates has assumed increased proportions in recent years. This phase of training involves the importance of analyzing future needs of the company. The principle objective is that of making efficient employees of the graduates by "practicalizing" college curricula. Very likely, the future top executives will come from this group. It is important to clearly define the purpose of this training even more than in other types of programs. Many companies are finding that on-the-job techniques are more valueable than long classroom schedules, with the latter being used only when closely linked with the work the trainee is doing. They are tending to give these men responsible jobs during training rather than keeping them in work of a purely observation or routine nature.

Although it is true that the qualities dealt with in supervisor training are of an abstract nature, it would probably be incorrect to say that no objective evaluation of the training is possible. Written reports will determine absorption of information; objective sampling will show whether improved skill in dealing with people is put into practice. The broad purpose of training is to improve job performance; there are certainly many methods of rating this



criterion. The ultimate test is the greater utility of the individual to the company over a period of years, and promotion records can indicate this to some degree. Whereas no one method gives a complete objective evaluation, a combination of various techniques will provide the company with some indication as to the fulfillment of its training purposes and objectives.

From the above summary and from the contents of this paper, some general conclusions can be drawn in regard to supervisor training programs:

- a) The entire management structure should be closely knit, from top to bottom, to permit proper coordination and a uniform interpretation of policies.
- b) It should be possible to use the same training approach for all levels of management since there is a basic similarity in responsibilities.
- c) Training needs should be discovered through careful study before a program can be effectively inaugurated and carried out.
- d) Training decisions should be arrived at through consultation with those concerned with the application of plans and policies.
- e) Training programs should be designed not only as a channel of instruction, but also as a permanent and necessary media for the continuous exchange of ideas essential to creative cooperative action.



- f) Frequent conferences between the training staff and top management are necessary to a well-coordinated training program.
- g) A complete job analysis is essential to intelligent training. An individual cannot effectively be trained unless the job descriptions and job specifications are properly drawn up and advantageously used.
- h) The training method adopted should be determined as a result of careful study of the organization bringing out which method best suits its needs.
- i) Supervisory training is relatively ineffective unless all of management actively participates in and cooperates with the program.

It costs a lot of money to train supervisors, and it takes a lot of time and effort. However, one principle is inescapable: neglect of training is much more expensive and time-consuming in the long run, requires a good deal more effort, and results in a less effective over-all organization.



### Appendix A

#### Principles of the Training-Within-Industry Program \*

##### Job Instruction Training (J.I.T.)

###### How to Get Ready to Instruct

1. Have a Time Table: how much skill you expect him to have by what date
2. Break Down the Job: Have important steps listed; pick out the key points
3. Have Everything Ready: the right equipment, materials, and supplies
4. Have the Workplace Properly Arranged: just as the worker will be expected to keep it

###### How to Instruct

- Step 1: Prepare the Worker
- Step 2: Present the Operation
- Step 3: Try Out Performance
- Step 4: Follow-up

##### Job Methods Training (J.M.T.)

- Step 1: Break Down the Job
- Step 2: Question Every Detail
- Step 3: Develop the New Method
- Step 4: Apply the New Method

Objective: "to help the supervisor produce greater quantities of quality products in less time, by making best use of manpower, machines, and materials now available."

##### Job Relations Training (J.R.T.)

###### Foundations for Good Relations

1. Let each worker know how he is getting along
2. Give credit when due
3. Tell people in advance about changes which will affect them
4. Make best use of each person's ability

\* Outlines of programs as it appears on pocket cards



**Method Involved****Step 1:** Get the facts

- a) review the record
- b) find out what rules and plant customs apply
- c) talk with individuals concerned
- d) get opinions and feelings

**Step 2:** Weigh and Decide

- a) fit the facts together
- b) consider their bearing on each other
- c) what possible actions are there?
- d) check practices and policies
- e) consider objective and effect on individual, group, and production

**Step 3:** Take Action

- a) are you going to handle this yourself?
- b) do you need help in handling?
- c) should you refer this to your superior?
- d) watch the timing of your action

**Step 4:** Check Results

- a) how soon will you follow up?
- b) how often will you need to check?
- c) watch for changes in output, attitudes, and relationships

**Program Development Training (P.D.T.)****Method Involved****Step 1:** Spot a Production Problem

- a) get supervisors and workers to tell about their current problems
- b) uncover problems by reviewing records
- c) anticipate problems resulting from changes
- d) analyze this evidence
- e) identify training needed

**Step 2:** Develop a Specific Plan

- a) who will be trained?
- b) what content? who can help determine?
- c) how can it best be done?
- d) who should do the training?
- e) when should it be done? how long will it take?
- f) where should it be done?

**Step 3:** Get Plan into Action

- a) stress to management evidence of need
- b) present the expected results
- c) discuss plan in content and methods
- d) submit timetable for plan



- e) train those who do the training
- f) secure understanding and acceptance by those affected
- g) fix responsibility for continuing use

Step 4: Check Results

- a) how can results be checked? against what evidence?
- b) what results will be looked for?
- c) is management being informed - how?
- d) is the plan being followed?
- e) how is it being kept in use?
- f) are any changes necessary?

Responsibility for Training Results

1. The LINE organization has the responsibility for making continuous use of the knowledge and skills acquired through training as a regular part of the operating job.
2. The STAFF provides plans and technical "know how" and does some things for but usually works through the line organization.



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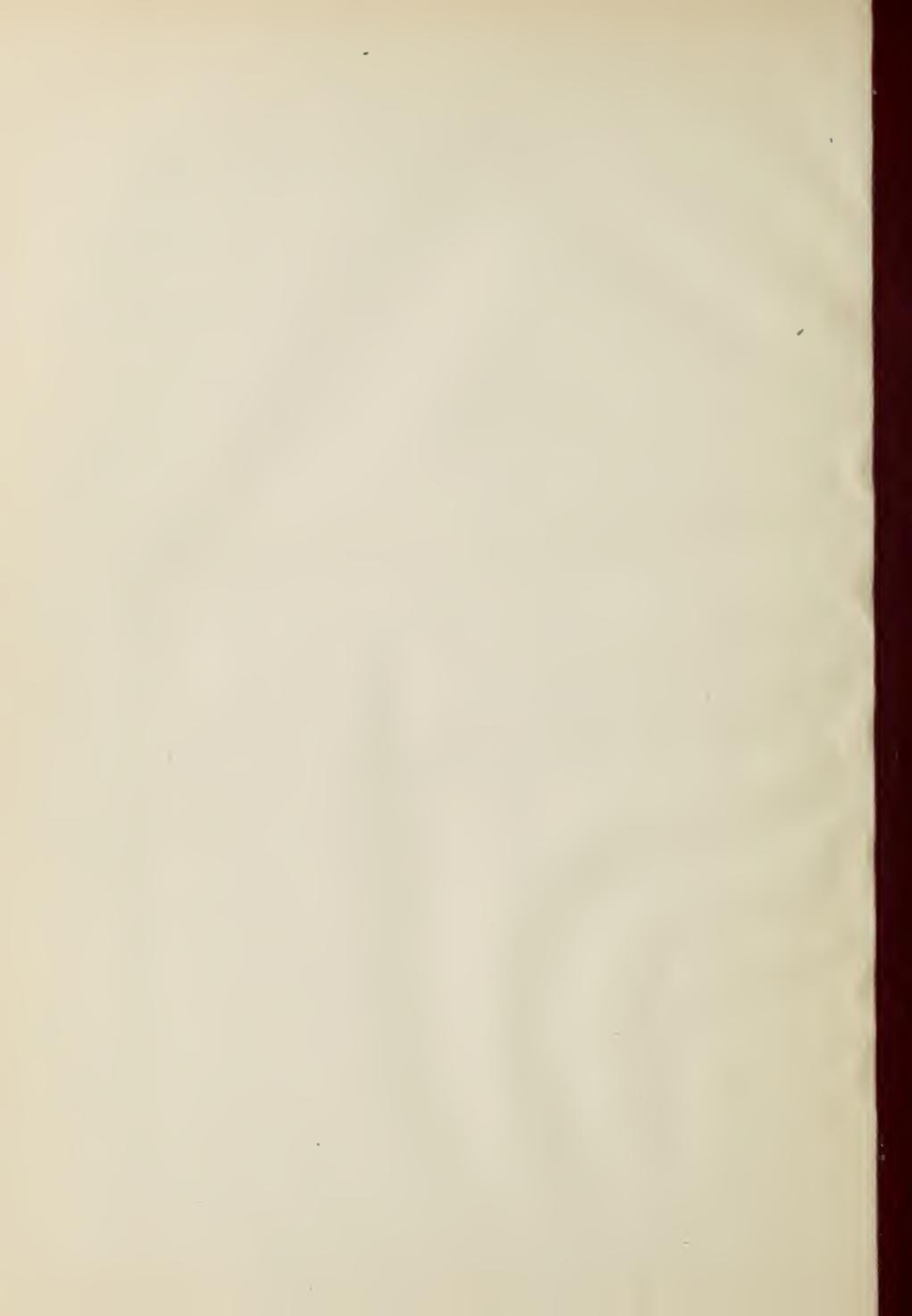
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Levine Joshua	*331.115 L57 c.1
Training Supervisors	
DATE	RECORDED TO
7/20	Cat rm Stanley Anne bra

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BOSTON UNIVERSITY



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